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ABSTRACT

This course curriculum is intended for use by community college instructors and administrators in implementing an advanced information processing course. It builds on the skills developed in the previous information processing course but goes one step further by requiring students to perform in a simulated office environment and improve their decision-making skills. This volume contains two parts of the curriculum--the instructor materials. The instructor's course syllabus outlines prerequisites, required texts, references, required equipment and materials, instructional process, and student evaluation. Competency statements and a course outline are included. The instructor's guide is divided into the 12 units of the course: updating company files, jobs using dBase 3 and Lotus 1-2-3, medical, medical forms, legal, miscellaneous documents, learning new software, dictation, printing out database management and spreadsheet files, an office automation project, decision making, and training. Materials provided for each unit include unit content, unit objectives, required equipment and materials, procedures, a list of learning activities, and keys to the jobs (learning activities).
(YLB)

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Curriculum Improvement Project
Region II

**ADVANCED INFORMATION
PROCESSING**

Volume II: Instructor's Materials

Developed by Linda Stanford

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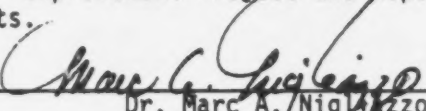
Project Director: Cheryl L. Willis, Ph.D.

June 30, 1987

CE048093

FOREWORD

Galveston College is not unlike other small community colleges trying to keep its curriculum in sight of rapidly changing technologies. We are unique, however, in that we were given an opportunity by the Coordinating Board of the State of Texas through a grant of Carl D. Perkins Act vocational funds to undertake a major curriculum improvement project which had as its focus curricula for accounting, the allied health professions, microcomputer applications, and office occupations. The course curriculum that you have before you is one of nine courses or modules that were developed from this project. What cannot be immediately evident to you, though, is the sense of cooperation that governed the various phases of the project. The resulting benefits to the College, its faculty, and its staff as a result of this project, were many, including increased knowledge of the curriculum improvement process, increased knowledge of the ramifications of networking microcomputers, increased awareness of the vocational programs of other community colleges, and increased awareness of the need for staff development opportunities. The enduring impact of this project will come in the months ahead as our instructors, and hopefully other instructors across Region II and the state, implement the curricula. We at Galveston College are proud of the results of the Curriculum Improvement Project and hope that your college will share the benefits.



Dr. Marc A. Niglas
Vice President and Dean of Instruction
June 30, 1987

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Copies of the above course curriculum are available for a nominal
cost from: Division of Business and Technology
Galveston College
4015 Avenue Q
Galveston, TX 77550

ACKNOWLEDGMENTS

This course curriculum represents but one of the many final products of the Curriculum Improvement Project. I want to take this opportunity to thank those individuals who worked so hard together to bring this project to a successful conclusion. To the administration and the Board of Regents of Galveston College I wish to express my appreciation for their willingness to accept the challenges and risks associated with a project of this magnitude and for having the forethought to see its benefits for the college and the community. To the support staff in the Business Office and the Office of Planning and Development, thank you for your patience and helpfulness in providing the project staff with everything we needed--yesterday. To Karla Back, Assistant Dean of the Division of Business and Technology, for her constant encouragement of the vision of the project, I will be forever grateful. My most heartfelt thanks, though, go to the project team--all of the curriculum writers who gave 110 percent effort whenever it was needed; the various editors and word processors who helped us along the way; Paul Fama, Research Associate, who provided constancy and consistency; and Mary James, project secretary, who kept us all sane.

Galveston, Texas
June 30, 1987

Cheryl L. Willis, Ph.D.
Project Director

P R E F A C E

Advanced Information Processing builds on the skills developed in the previous information processing course, but goes one step further by requiring the student to perform in a simulated office environment, thus improving her decision-making skills. The following course curriculum should be used as a resource by fellow instructors and administrators when making decisions about implementing a similar course at their institutions. This course curriculum contains four parts in two volumes--the student's course syllabus and student's laboratory guides for each unit (Volume I) and the instructor's course syllabus and instructor's guides for each unit of the course (Volume II). The materials presented in this course curriculum are only a suggested format for a course of this nature and, as typical with community college curriculum, will undergo revision in the future. The author and Galveston College welcome your comments regarding your experience with these materials.

VOLUME II
INSTRUCTOR'S MATERIALS



**INSTRUCTOR'S COURSE
SYLLABUS**

OFT 2402: Advanced Information Processing

INSTRUCTOR'S COURSE SYLLABUS

Course Title: Advanced Information Processing

Course Number:

OFT	2402	3	2	4
Prefix	No.	Lecture Hrs.	Lab Hrs.	Credit Hrs.

Catalog Description:

Capstone course in which students apply their information processing skills in a simulated office environment. Lab fee.

Prerequisite:

OFT 2401--Intermediate Information Processing:
Information processing applications in a networked environment. Students will learn to use advanced word processing applications in addition to learning practical applications of a spreadsheet, data base, graphics, electronic mail and files.

Texts:

Advanced Information Processing Student's Laboratory Guides

Word/Information Processing: Exercises, Applications, and Procedures, by L. Joyce Arntson and Lora Brunello Todesco.

How To Dictate, by Adele F. Schrag, McGraw-Hill Book Company, 1981.

References:

Medical Transcription With Advanced Terminology, by Lois R. Tutherly, Delmar Publishers Inc., 1987.

Word/Information Processing Concepts of Office Automation, 2nd edition, by Gary Bergerud and Jean Gonzales, John Wiley & Sons, 1984.

Applications Manual For Electronic Office Procedures, by Rosemary T. Fruehling and Constance K. Weaver, McGraw-Hill Book Company, 1987.

Equipment and Materials Required:

Hardware:

Microcomputer (640K) with 2 disk drives per student

Software:

DisplayWrite 4, dBase3, Lotus 1-2-3, Sidekick

Instructional Process:

1. Self-paced teaching methods--one-on-one instruction
2. Class and laboratory assignments
3. Tests
4. Office automation research project and a written report

Evaluation of Students:

Class and Laboratory Assignments will make up 40% of the final grade. These assignments are to be done by the student in the laboratory. These jobs are to be graded for mailability. If the job is mailable upon first submission, a grade of 100 will be assigned to that job. If the job is not mailable on the first submission, the student will make the necessary corrections and resubmit. If the job is correct on the second submission, a grade of 89 will be assigned to that job. If the job is not mailable on the second submission, the students will make the necessary corrections and resubmit. If the job is correct on the third submission, a grade of 79 will be assigned to that job. If the job is not mailable on the third submission, a grade of 50 will be assigned to that job.

The Automation Project will make up 30% of final grade. This project will enable the student to totally automate a company. The student will make decisions concerning software, computer equipment, network system, furniture and accessories, dictation equipment, * teleconferencing, OCR equipment, telephone system, copy equipment, etc. The student will use Lotus 1-2-3 to make a spreadsheet which compares different brands of equipment and which creates a graph to be used in the final report. The student will compose a report describing all equipment and accessory choices made for the company. This project will be graded for completeness of equipment choices and their justification, for correctness of word choices, grammar, and punctuation, and for transition from one paragraph to another.

Tests make up 20% of the final grade and will be given at the end of the first six units. The jobs in the tests will be similar to the jobs in that unit.

Technique makes up 10% of the final grade. The technique grade will evaluate the student's ability to work alone asking questions only when necessary, the ability to make decisions after reading and comparing information, the ability to use the software with a minimum amount of help from the instructor, the ability to use time wisely, the ability to bring all necessary supplies and books to class, and the ability to maintain a positive attitude toward the course and the instructor.

Final Grade Determination:

Class and Laboratory Assignments	40%
Automation Project	30%
Tests	20%
Technique	10%
Total	100%

Competency Statements:

Office Technology Program exit competencies upon which course is based:

1. Type from handwritten or rough draft copy.
2. Type reports.
3. Type business forms.
4. Proofread typewritten material.
5. Initialize diskette.
6. Key document from longhand.
7. Key document from machine transcription.
8. Key document from edited rough draft.
9. Prepare backup file.
10. Maintain backup file.
11. Store repetitive material.
12. Update spelling dictionary.
13. Copy one diskette to another.
14. Make document format changes.
15. Make manual and automatic pagination decisions.
16. Create headers and footers within documents.
17. Create columns of text.
18. Create numeric tables.
19. Compose correspondence.
20. Create glossary files.
21. Key data into an electronic spreadsheet.
22. Create an electronic spreadsheet.
23. Enter formulas into an electronic spreadsheet.
24. Retrieve an electronic spreadsheet file.
25. Copy an electronic spreadsheet file.

26. Edit and combine electronic spreadsheet files.
27. Create an electronic database file.
28. Key data into an electronic database file.
29. Retrieve database files.
30. Copy databasefiles.
31. Edit database files.
32. Key data to prepare graphs and charts.
33. Import database file into word processing file.
34. Import an electronic spreadsheet file into word processing file.
35. Proofread document for content, format, and typographical errors.
36. Move (rearrange) text.
37. Search and replace text.
38. Insert and delete text.
39. Rename files.
40. Insert end-of-line hyphens into text.
41. Prepare new document from existing documents.
42. Spell correctly and use proper grammar and punctuation.
43. Print document using continuous-feed paper.
44. Print document using single-sheet paper.
45. Output information according to sort criteria.
46. Describe the components of the information processing cycle.
47. Describe the various technologies used to create information.
48. Describe the various technologies used to store and/or retrieve information.
49. Describe the various technologies used to process information.
50. Plan office layout.
51. Describe the various technologies used to distribute information.
52. Explain the basic concepts of electronic spreadsheets.
53. Explain the basic concepts of database management.
54. Explain the basic concepts of records management.
55. Explain the basic concepts of telecommunications.
56. Describe the operation of graphics application packages.
57. Explain the basic concepts of integrated information processing.
58. Describe the components of computer hardware.
59. Describe the two basic types of software.
60. Explain the use of a local area network.
61. Describe the factors to be considered in selecting a microcomputer for a business office.
62. Describe the factors to be considered in selecting applilcations software for a business office.
63. Describe the procedures for installing software onto a hard disk.
64. Describe the basic concepts of ergonomics.
65. Describe the future trends in information processing.
66. Value the importance of good time management skills.
67. Value the importance of responsible work behavior.
68. Value the importance of attention to detail.

69. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
70. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.
71. Give and receive constructive criticism concerning work performance.

Course Outline:

Contents of Unit 1: Updating Company Files

A. Floppy Disk Management

1. Format and label one disk for database and spreadsheet files.
2. Format and label one disk for DisplayWrite 4 documents.
3. Format and copy information on three disks for files management.
4. Rename documents to reflect the content in each document.
5. Rearrange documents on two disks to organize like documents on each disk.
6. Print the directories of disks and label disks for easy retrieval.

B. Setting Up Files for the Office

1. Create a data base of the employees in the office.
 - a. Edit and append the employee file
 - b. Print various lists from the employee file
2. Create a database of the clients served by the office.
 - a. Edit and append the client file
 - b. Print various lists from the client file
3. Set up a calendar for the office manager and the accountant using Sidekick.
4. Set up the telephone files in Sidekick with employees' and clients' numbers.
5. Create a shell spreadsheet on Lotus 1-2-3 to use for billing purposes for clients.
6. Create a spreadsheet on Lotus 1-2-3 for each client on the client list using the spreadsheet shell.
7. Create a spreadsheet on Lotus 1-2-3 for the budget of Secretaries Incorporated.

Contents of Unit 2: Jobs using dBase 3 and Lotus 1-2-3

1. Create a data base of the Private School for the Learning Center.
2. Edit the data base for the Learning Center.
3. Create a data base for inventory control at Secretaries Incorporated.
4. Update client files in dBase 3, client billing in Lotus 1-2-3, and calendar in Sidekick.
5. Create a spreadsheet of the budget for the Learning Center.
6. Edit the spreadsheet for the Learning Center.
7. Create a spreadsheet for grades for a local teacher.
8. Update client files in dBase 3, client billing in Lotus 1-2-3, and calendar in Sidekick.

Contents of Unit 3: Medical

1. Read new information about medical documents
2. Create shells for medical documents
3. Create a History and Physical Report
4. Create a Consultation Report
5. Create an Operative Report
6. Create a Discharge Summary
7. Create a Short-Stay Report
8. Create a Radiology Report
9. Create a Pathology Report
10. Create an Autopsy Report
11. Update client files in dBase3, client billing in Lotus 1-2-3, and calendar in Sidekick

Contents of Unit 4: Completing Medical Forms

1. Create a Patient Registration form
2. Create an Authorization for Release of Information
3. Create an application for employment
4. Create a form for patient lists
5. Prepare patients lists
6. Complete insurance forms
7. Update client files in dBase 3, client billing in Lotus 1-2-3, and calendar in Sidekick

Contents of Unit 5: Legal

1. Read material on legal documents and create a shell for the legal heading
2. Create a will
3. Create a property description
4. Create an interrogatory
5. Update client files in dBase 3, client billing in Lotus 1-2-3, and calendar in Sidekick

Contents of Unit 6: Miscellaneous Documents/Transcription

1. Statistical Typing--on the Electric Typewriter
2. Statistical Typing--on the Electric Typewriter
3. Definitions--on the Electric Typewriter
4. Transcription--news release announcing the new employee
5. Transcription--Paragraph alignment
6. Transcription--Tabulation
7. Boilerplate
8. Boilerplate
9. Merge letter
10. Itinerary
11. Dictate--news release announcing the new consultant service
12. Compose a letter to inform clients of the new consultant aspect of the business and merge with the client list
13. Update client files in dBase 3, client billing in Lotus 1-2-3, and calendar in Sidekick

Contents of Unit 7: Learning New Software

1. Read the manual to learn
2. Create a report using.

Contents of Unit 8: Dictation

1. Complete the modules on guidelines for dictation
2. Dictate an organized letter

Contents of Unit 9: Printing Of Client Bills

1. Print client and employee databases
2. Print Secretaries Incorporated's budget spreadsheet
3. Print all bills

Contents of Unit 10: Automation Project

1. Read the handout on the company to be automated
2. Using the information provided by the instructor, make decisions regarding computer software and equipment, printers, dictation equipment, OCR equipment, copy equipment, teleconferencing, furniture, and accessories
3. Use Lotus 1-2-3 to create spreadsheets for evaluating each area of automation
4. Write a report, including graphs and written descriptions of the decisions made, regarding equipment, etc.

Contents of Unit 11: Decision Making (This unit should be done at a time when all of the students can work together to add a change of pace to the course)

1. Group work on "Solve-a-Problem"
2. Group work on "Caught in the Middle"

Contents of Unit 12: Training (This unit should be done at a time when all of the students can work together to add a change of pace to the course)

1. Compose an instruction sheet at the computer giving step-by-step instructions of the training task
2. Practice demonstrating the training task
3. Demonstrate the training task to the trainee
4. Assign a task for the trainee to do that will demonstrate the trainee's ability to do the task
5. Evaluation by trainer, trainee, and instructor



INSTRUCTOR'S GUIDE

UNIT 1
UPDATING COMPANY FILES

OFT 2402: Advanced Information Processing

INSTRUCTOR'S GUIDE

Unit 1

Unit Title: Updating Company Files

Contents of Unit:

A. Floppy Disk Management

1. Format and label one disk for data base and spreadsheet files.
2. Format and label one disk for DisplayWrite 4 documents.
3. Format and copy information on three disks for files management.
4. Rename documents to reflect the content in each document.
5. Rearrange documents on two disks to organize like documents on each disk.
6. Print the directories of disks and label disks for easy retrieval.

B. Setting up Files for the Office

1. Create a data base of the employees in the office.
 - a. Edit and append the employee file.
 - b. Print out various lists from the employee file.
2. Create a data base of the clients served by the office.
 - a. Edit and append the client file.
 - b. Print out various lists from the client file.
3. Set up the Calendar for the Office Manager and the Accountant using Sidekick.
4. Set up the telephone files in Sidekick with the employees' and the clients' numbers.
5. Create a shell spreadsheet on Lotus 1-2-3 to use for billing purposes for clients.
6. Create a spreadsheet on Lotus 1-2-3 for each client on the client list using the spreadsheet shell.
7. Create a spreadsheet on Lotus 1-2-3 for the budget of Secretaries Incorporated.

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Create, edit, append, and print files using a database management software package.
2. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
3. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Handouts for Unit 1

Software: dBase3, Sidekick, 3 formatted diskettes.

Hardware: Microcomputer (640K) with 2 disk drives per student.

Disks: Disks containing jobs for dBase3 and Lotus 1-2-3 are available upon request at Galveston College.

Procedures:

Simulation

Learning Activities:

Students are to follow instructions given in Student's Laboratory Guides to complete Jobs 1-13 in Unit 1.

Keys to Learning Activities:

The following pages contain the keys to the jobs in Unit 1. The student's jobs may vary from these keys depending upon how creative they are.

The keys for the client and employees files created on dBase3 have the name of the file used and the name of the report form used to print handwritten under the printout.

Procedures:

Job 1--Disk Preparation

1. The student should format his/her disks. The student should have a disk for each of the following: data base files, spreadsheet files, and DW4 files. These should be labeled appropriately.
2. The student will get the three blank disks for Disk Preparation from you and copy these onto some blank working disks you may have. These can be formatted and reused throughout the class. There is no "exact" name for each document on these disks. However, the student should name the documents something that will remind the student of that document. You will want to check that the student is grouping them by using the extension.

The following are some sample names for the documents found on the disks:

Disk No. 1

Name on the Disk	Possible New Name
LETTER1.TXT	INVESTOR.LET
STATE.TXT	GICORFIN.STA
NEWS.TXT	FAMPRAC.NEW
ANNOUNCE.TXT	CSEXAM.ANN
LETTER2.TXT	MEAD.LET*
REPORT2.TXT	NPECINVE.UPD

Disk No. 2

REPORT3.TXT	MIDTERM.REP
REPORT4.TXT	OAC.REP*
NAME.TXT	PUNCNAME.HAN
QUESTION.TXT	PROCHEC1.110
REPORT5.TXT	EXTRAPTS.330
REPORT1.TXT	PRECENT.REP
LETTER1.TXT	MEAD.LET*
LES34.SGC	LES34.INS*
REPORT2.TXT	DAILYLES.REP*

Disk No. 3

REPORT1.TXT	HB72.REP
OAC.TXT	OAC.REP*
INS.TXT	MEAD.LET*
LESPLAN2.TXT	DAILYLES.REP*
LES34.SGC	LES34.INS*
REPORT3.TXT	COGAFFSY.REP
REPORT2.TXT	BASBUS.REP

The student may want to type out a sheet showing the definitions of the extensions like the following:

REP -- REPORT
HAN -- HANDOUT
LET -- LETTER
110 OR 330 -- COURSE NUMBERS
INS -- INSTRUCTIONS
UPD -- UPDATE
ANN -- ANNOUNCEMENT
STA -- STATEMENT

3. These documents may be arranged in any combination of ways on the two disks. As long as the students have grouped them according to extensions, they have met the objective of this exercise.

Job 2 - Employee File

Job 2 involves creating an employee file in dBase 3. The file created by the students may look different from the following keys for the parts of Job 2. However, the same information should be in each list.

A limited amount of instructions were given for the parts of Job 2 in order for the students to have to make decisions for themselves. Therefore, the titles of the lists and the column headings may vary from the keys.

On Part 4, it is very important for the students to create a "date" field in the employee file in order to sort the date of employment. The dates entered in this field must be entered with the year first, month second, and day last (87-02-24). When the list is printed, the field "employment" should be used.

The students have been requested to make a notebook of all forms printed and the names of the file and the report form file used for each form. This notebook will help them in files management since they will be dealing with a number of files, report forms, and lists. This notebook can be checked by the instructor or left up to the student to complete.

ADVANCED INFORMATION PROCESSING
Instructor's Guide--Unit 1

PAGE 5
Unit 1 Job 2 Part 1

cord#	LAST_NAME CITY	FIRST_NAME STATE	INITIAL ZIP	TITLE EMPLOYMENT SS	ADDRESS EXTENSION DEPARTMENT
1	Drake Waco	Susan TX	D. 79710	Office Manager 03-08-83 483-87-8976 364	234 Smith Management
	Yes	83-03-08			
2	Smith Waco	Donna TX	C. 76710	Word Processing Specialist I 02-04-86 456-98-9764 321	2356 Town Word Proces
	Yes	86-02-04			
3	Jones Waco	Jim TX	J. 76710	Accountant 03-24-85 235-32-8765 342	1425 Fish Accounting
	Yes	85-03-24			
4	Freeman Waco	Linda TX	S. 76710	Word Processing Specialist II 03-14-85 239-98-7354 341	1234 Crest Word Proces
	Yes	85-03-14			
5	Timbers Waco	John TX	T. 76708	Jr. Accountant 02-17-86 234-98-6879 340	435 Meyers Accounting
	Yes	86-02-17			
6	Walker Waco	Katy TX	S. 76710	Word Processing Trainee 01-14-87 549-98-3487 200	2525 Linda Word Proces
	Yes	87-01-14			
7	Spikes Waco	Kathryn TX	V. 76710	Word Processing Specialist II 02-02-84 098-38-7543 346	4508 Lake Word Proces
	Yes	84-02-02			
8	Smith Waco	Jamie TX	C. 76706	Word Processing Specialist I 03-20-85 786-04-8745 330	8764 Ember Word Proces
	Yes	85-03-20			
9	Scott Waco	Lance TX	J. 76707	Public Relations 01-23-85 789-23-6784 239	9476 Beth Public Rela
	No	85-01-23			
10	Darem Waco	Janet TX	R. 76710	Receptionist 03-02-87 987-23-5403 235	876 Strong Word Proces
	Yes	87-03-02			
11	Anderson Waco	Anna TX	S. 76710	Temporary Secretary 12-03-86 345-68-2037 325	253 Belvie Secretary
	No	86-12-03			
12	Sampleton Waco	Robert TX	D. 76707	Temporary Secretary 12-03-86 345-68-2037 324	345 Times Secretary
	No	86-12-03			
13	Simpson Waco	Joyce TX	F. 76703	Duplicating Clerk 11-04-86 283-63-0974 237	4857 Brend Word Proces
	Yes	86-11-04			
14	Johnson Waco	Melba TX	J. 76709	Temporary Secretary 09-23-85 098-34-8467 238	2309 Patri Secretary
	Yes	85-09-23			
15	Student Waco	Susie TX	J. 76710	Word Processing Specialist 01-13-87 345-89-4567 201	3421 Dream Word Proces
	Yes	87-01-13			

Disks - dBase 3 + dBase + Lotus Data disk
Use employee
List to print

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SECRETARIES INCORPORATED
EMPLOYEE LIST
Extension List
Current Date

Sort By Name

LAST NAME	FIRST NAME	INITIAL	DEPARTMENT	EXTENSION
Anderson	Anna	S.	Secretary	325
Darem	Janet	R.	Word Processing	235
Drake	Susan	D.	Management	364
Freeman	Linda	S.	Word Processing	341
Johnson	Melba	J.	Secretary	238
Jones	Jim	J.	Accounting	342
Sampleton	Robert	D.	Secretary	324
Scott	Lance	J.	Public Relations	239
Simpson	Joyce	F.	Word Processing	237
Smith	Donna	C.	Word Processing	321
Smith	Jamie	C.	Word Processing	330
Spikes	Kathryn	V.	Word Processing	346
*Student	Susie	J.	Word Processing	201
Timbers	John	T.	Accounting	340
Walker	Katy	S.	Word Processing	200

** Students name*

*Disks - dBase 3 Program Disks
dBase + Lotus Data Disk*

use sortname

Report Form Cstreport to print

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05/16/87

SECRETARIES INCORPORATED
EMPLOYEE LIST
Extension List
Current Date

*Sort by Department
& Name*

LAST NAME	FIRST NAME	INITIAL	DEPARTMENT	EXTENSION
Jones	Jim	J.	Accounting	342
Timbers	John	T.	Accounting	340
Drake	Susan	D.	Management	364
Scott	Lance	J.	Public Relations	239
Anderson	Anna	S.	Secretary	325
Johnson	Melba	J.	Secretary	238
Sampleton	Robert	D.	Secretary	324
Darem	Janet	R.	Word Processing	235
Freeman	Linda	S.	Word Processing	341
Simpson	Joyce	F.	Word Processing	237
Smith	Donna	C.	Word Processing	321
Smith	Jamie	C.	Word Processing	330
Spikes	Kathryn	V.	Word Processing	346
* Student	Susie	J.	Word Processing	201
Walker	Katy	S.	Word Processing	200

** Students name*

Disks - dBase 3 Program disks

dBase + Lotus Data Disk

use sort dept

Report from Extreport to print.

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SECRETARIES INCORPORATED
LIST OF EMPLOYEES
DATE OF EMPLOYMENT
CURRENT DATE

*descending
order*

LAST NAME	FIRST NAME	DEPARTMENT	EMPLOYMENT
Darem	Janet	Word Processing	03-02-87
Walker	Katy	Word Processing	01-14-87
*Student	Susie	Word Processing	01-13-87
Anderson	Anna	Secretary	12-03-86
Sampleton	Robert	Secretary	12-03-86
Simpson	Joyce	Word Processing	11-04-86
Timbers	John	Accounting	02-17-86
Smith	Donna	Word Processing	02-04-86
Johnson	Melba	Secretary	09-23-85
Jones	Jim	Accounting	03-24-85
Smith	Jamie	Word Processing	03-20-85
Freeman	Linda	Word Processing	03-14-85
Scott	Lance	Public Relations	01-23-85
Spikes	Kathryn	Word Processing	02-02-84
Drake	Susan	Management	03-08-83

* Student's name

Disks - dBase 3

dBase + Lotus Data Disks

use empdata

Report form data to print

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SECRETARIES INCORPORATED
LIST OF EMPLOYEES
DATE OF EMPLOYMENT
CURRENT DATE

*according
order*

LAST NAME	FIRST NAME	DEPARTMENT	EMPLOYMENT
Drake	Susan	Management	03-08-83
Spikes	Kathryn	Word Processing	02-02-84
Scott	Lance	Public Relations	01-23-85
Freeman	Linda	Word Processing	03-14-85
Smith	Jamie	Word Processing	03-20-85
Jones	Jim	Accounting	03-24-85
Johnson	Melba	Secretary	09-23-85
Smith	Donna	Word Processing	02-04-86
Timbers	John	Accounting	02-17-86
Simpson	Joyce	Word Processing	11-04-86
Anderson	Anna	Secretary	12-03-86
Sampleton	Robert	Secretary	12-03-86
* Student	Susie	Word Processing	01-13-87
Walker	Katy	Word Processing	01-14-87
Darem	Janet	Word Processing	03-02-87

* *Student's name*

*Disks - dBase 3 Program Disks
dBase + Lotus Data Disk*

use empdata

Report form date to print

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SECRETARIES INCORPORATED
LIST OF EMPLOYEES
SOCIAL SECURITY NUMBER
CURRENT DATE

LAST NAME	FIRST NAME	DEPARTMENT	SS#
Anderson	Anna	Secretary	345-68-2037
Darem	Janet	Word Processing	987-23-5403
Drake	Susan	Management	483-87-8976
Freeman	Linda	Word Processing	239-98-7354
Johnson	Melba	Secretary	098-34-8467
Jones	Jim	Accounting	235-32-8765
Sampleton	Robert	Secretary	345-68-2037
Scott	Lance	Public Relations	789-23-6784
Simpson	Joyce	Word Processing	283-63-0974
Smith	Donna	Word Processing	456-98-9764
Smith	Jamie	Word Processing	786-04-8745
Spikes	Kathryn	Word Processing	098-38-7543
*Student	Susie	Word Processing	345-89-4567
Timbers	John	Accounting	234-98-6879
Walker	Katy	Word Processing	549-98-3487

Students name

Disks - dBase3

dBase + Lotus Data Disk

use sortname

Report Form names to print

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SECRETARIES INCORPORATED
LIST OF EMPLOYEES
HOME ADDRESSES
CURRENT DATE

LAST NAME	FIRST NAME	ADDRESS	CITY	STATE	ZIP
Anderson	Anna	253 Belview Drive	Waco	TX	76710
Daren	Janet	876 Stronge Street	Waco	TX	76710
Drake	Susan	234 Smith	Waco	TX	79710
Freeman	Linda	1234 Crest Street	Waco	TX	76710
Johnson	Melba	2309 Patricia	Waco	TX	76709
Jones	Jim	1425 Fish Pond	Waco	TX	76710
Sampleton	Robert	345 Times Street	Waco	TX	76707
Scott	Lance	9476 Beth	Waco	TX	76707
Simpson	Joyce	4857 Brenda Street	Waco	TX	76703
Smith	Donna	2356 Town Street	Waco	TX	76710
Smith	Jamie	8764 Embers	Waco	TX	76706
Spikes	Kathryn	4508 Lake Air	Waco	TX	76710
*Student	Susie	3421 Dream Street	Waco	TX	76710
Timbers	John	435 Meyers Lane	Waco	TX	76708
Walker	Katy	2525 Linda Lane	Waco	TX	76710

* Student's Name

Disks - dBase 3

dBase + Lotus Data Disk

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Report Form nameaddr to print

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SECRETARIES INCORPORATED
LIST OF EMPLOYEES
TELEPHONE NUMBERS
CURRENT DATE

LAST NAME	FIRST NAME	TELEPHONE NUMBER
Anderson	Anna	776-9875
Darem	Janet	772-0964
Drake	Susan	752-3344
Freeman	Linda	772-3497
Johnson	Melba	751-0936
Jones	Jim	776-3297
Sampleton	Robert	666-3409
Scott	Lance	751-0937
Simpson	Joyce	776-0639
Smith	Donna	753-4499
Smith	Jamie	756-2093
Spikes	Kathryn	772-3048
*Student	Susie	772-0964
Timbers	John	666-3048
Walker	Katy	662-9865

* Student Name

Disks - dBase 3 Program Disk
dBase + Lotus Data Disk

use sortname

report form file to print

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SECRETARIES CORPORATED
LIST OF EMPLOYEES
NETWORK ACCESS LIST
CURRENT DATE

LAST NAME	FIRST NAME	DEPARTMENT	EXTENSION	NETWORK
Anderson	Anna	Secretary	325	No
Sampleton	Robert	Secretary	324	No
Scott	Lance	Public Relations	239	No
Darem	Janet	Word Processing	235	Yes
Drake	Susan	Management	364	Yes
Freeman	Linda	Word Processing	341	Yes
Johnson	Melba	Secretary	238	Yes
Jones	Jim	Accounting	342	Yes
Simpson	Joyce	Word Processing	237	Yes
Smith	Donna	Word Processing	321	Yes
Smith	Jamie	Word Processing	330	Yes
Spikes	Kathryn	Word Processing	346	Yes
*Student	Susie	Word Processing	201	Yes
Timbers	John	Accounting	340	Yes
Walker	Katy	Word Processing	200	Yes

* Student's Name

Disks - dBase 3

dBase + Lotus data disk

use network

Report Form Net to print

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SECRETARIES INCORPORATED
LIST OF EMPLOYEES
ADDRESSES AND TELEPHONE NUMBERS
CURRENT DATE

LAST NAME	FIRST NAME	ADDRESS	CITY	STATE	ZIP CODE	TELE NUMBER
Anderson	Anna	253 Belview Drive	Waco	TX	76710	776-9875
Daren	Janet	876 Stronge Street	Waco	TX	76710	772-0964
Drake	Susan	234 Smith	Waco	TX	79710	752-3344
Freeman	Linda	1234 Crest Street	Waco	TX	76710	772-3497
Johnson	Melba	2309 Patricia	Waco	TX	76709	751-0936
Jones	Jia	1425 Fish Pond	Waco	TX	76710	776-3297
Sampleton	Robert	345 Times Street	Waco	TX	76707	666-3409
Scott	Lance	9476 Beth	Waco	TX	76707	751-0937
Simpson	Joyce	4857 Brenda Street	Waco	TX	76703	776-0639
Smith	Donna	2356 Town Street	Waco	TX	76710	753-4499
Smith	Jamie	8784 Embers	Waco	TX	76706	756-2093
Spikes	Kathryn	4508 Lake Air	Waco	TX	76710	772-3048
*Student	Susie	3421 Dream Street	Waco	TX	76710	772-0964
Timbers	John	435 Meyers Lane	Waco	TX	76708	666-3048
Walker	Katy	2525 Linda Lane	Waco	TX	76710	662-9865

* Student's Name

Disks - dBase 3 Program Disk
dBase + Lotus Date Disk

use sortname

Report from addtele to print

Job 3--Client File

The student will create a client file using dBase 3. The file has 26 records to be keyboarded. Lists will be printed to compile different data.

On Part 5, one record is added to the client file and two records are edited. After this is accomplished, the students must ~~re-sort~~ the lists made in Parts 2-4. The program will ask them to overwrite the files, and they should do this to include the new record and the edited information. The report forms they have created will not be changed.

ADVANCED INFORMATION PROCESSING
Instructor's Guide--Unit 1

PAGE 16
Unit 1 Job 3 Part 1

Records	CO_NAME	STATE	ZIP_CODE	ACCT_NO	CO_OWNER	TELEPHONE WORK	ADDRESS
CITY							CUSTOMER
1	John's Print Shop				David, John		4598 Main Street
Waco	TX	78708	8785	757-8983	Draft Typing		Weekly
2	Prinston Mfg.				Prinston, Ed		5320 Loop 340
Waco	TX	78708	8984	765-3408	Letter		Weekly
3	James Cassidy, Attorney				Cassidy, James		2350 Winsor
Waco	TX	78710	8897	757-0954	Legal Documents		Weekly
4	Smith Medi Center				Smith, James T., MD		1234 Sun Valley
Waco	TX	78710	8785	767-2389	Medical Doc.		Monthly
5	Baylor Student				James, Harold		2345 Baylor Avenue
Waco	TX	78703	8574	755-3948	Term Papers		As Needed
6	Hathaway Plumbing				Hathaway, Tim		3459 S. Valley Mills
Waco	TX	78708	8785	765-2398	Billings		Monthly
7	Williams Interior Design				Williams, Marcy		2389 Springer Street
Waco	TX	78710	8788	765-3940	Mass Mailings		Monthly
8	Turner Travel Agency				Turner, John P.		2349 Fort Street
Waco	TX	78710	9875	765-3409	Mass Mailings		Weekly
9	Thomas Johnson, M.D.				Johnson, Thomas M.D.		3405 Pine Street
Waco	TX	78710	8754	765-3409	Medical Doc		Weekly
10	Henry's Interiors				Henry, Jennifer		234 Fernwood
Waco	TX	78708	8735	758-3298	Correspondence		Monthly
11	James T. Baker, Attorney				Baker, James T.		2349 Danville
Waco	TX	78710	8735	765-3290	Dictation		Weekly
12	St. James Hospital				Stafford, Terry, Adm.		8954 Westview
Waco	TX	78710	7654	765-2036	Dictation		Weekly
13	Don Stubing, Contractor				Stubing, Don		2309 Westmerry
Waco	TX	78708	8907	765-1209	Contracts		Weekly
14	West Maintenance				West, James		490 Fort Street
Waco	TX	78708	3472	765-9063	Mailings		Monthly
15	Jane Price, D.D.S.				Price, Jane		858 Austin Avenue
Waco	TX	78703	3894	752-0945	Mailings		Monthly
16	Attaway Marketing Inc.				Attaway, Tom		9878 Bosque
Waco	TX	78710	9878	765-3409	Correspondence		Monthly
17	Student				Panque, Jamie		3940 James
Waco	TX	78708	8843	765-3043	Term Papers		As Needed
18	Downing, Inc.				Downing, Cory		3094 Patricia
Waco	TX	78703	9843	765-2341	Budget		Monthly
19	Crammer Employment Agency				Crammer, Ted		3490 Fremont
Waco	TX	78710	7856	765-2098	Client List		Monthly
20	Dumas Independent Agency				Dumas, Tye		3490 Fremont
Bremont	TX	78895	0965	884-2094	Client List		Monthly
21	Jeff Evans, Attorney				Evans, Jeff		8905 Main
Clifton	TX	78894	3748	881-7943	Dictation		As Needed
22	Waco Sport Club				Swanson, Sam		4903 Sanger
Waco	TX	78710	7843	765-3209	Billings		Monthly
23	Spence Photography				Spence, Tammy		4965 Bosque
Waco	TX	78703	7845	758-3925	Mass Mailings		As Needed
24	Ballinger Marketing Service				Ballinger, Stewart		5973 Broughton
Waco	TX	78710	0954	757-3439	Temporary		As Needed
25	Pumps, Inc.				Stimpson, Dan		5894 James Street
Waco	TX	78783	3895	753-2050	Temporary		As Needed
26	Wylie Real Estate				Wylie, Jim		5940 West Avenue
Waco	TX	78710	0987	757-3409	Temporary		As Needed

use client

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SECRETARIES INCORPORATED
CLIENT LIST
APHABETIZED BY COMPANY NAME
CURRENT DATE

COMPANY NAME	ADDRESS	CITY	STATE	ZIP CODE
Attaway Marketing Inc.	9876 Bosque	Waco	TX	76710
Ballinger Marketing Service	5973 Broughton	Waco	TX	76710
Baylor Student	2345 Baylor Avenue	Waco	TX	76703
Crammer Employment Agency	3490 Fremont	Waco	TX	76710
Don Stubing, Contractor	2309 Westmerry	Waco	TX	76708
Downing, Inc.	3094 Patricia	Waco	TX	76703
Dumas Independent Agency	3490 Fremont	Bremont	TX	76895
Hathaway Plumbing	3459 S. Valley Mills	Waco	TX	76706
Henry's Interiors	234 Fernwood	Waco	TX	76709
James Cassidy, Attorney	2350 Winsor	Waco	TX	76710
James T. Baker, Attorney	2349 Danville	Waco	TX	76710
Jane Price, D.D.S.	658 Austin Avenue	Waco	TX	76703
Jeff Evans, Attorney	8905 Main	Clifton	TX	76894
John's Print Shop	4598 Main Street	Waco	TX	76708
Prinston Mfg.	5320 Loop 340	Waco	TX	76708
Pumps, Inc.	5894 James Street	Waco	TX	76763
Smith Medi Center	1234 Sun Valley	Waco	TX	76710
Spenco Photography	4965 Bosque	Waco	TX	76703
St. James Hospital	8954 Westview	Waco	TX	76710
Student	3940 James	Waco	TX	76708
Thomas Johnson, M.D.	3405 Pine Street	Waco	TX	76710
Turner Travel Agency	2349 Fort Street	Waco	TX	76710
Waco Sport Club	4903 Sanger	Waco	TX	76710
West Maintenance	490 Fort Street	Waco	TX	76708
Williams Interior Design	2389 Springer Street	Waco	TX	76710
Wylie Real Estate	5940 West Avenue	Waco	TX	76710

Disk - dBase

dBase + Lotus Data Disks

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SECRETARIES INCORPORATED
LIST OF CLIENTS
ALPHABETIZED BY NAME OF COMPANY
CURRENT DATE

COMPANY NAME	COMPANY OWNER	ACCT NO	TELEPHONE
Attaway Marketing Inc.	Attaway, Tom	9876	765-3409
Ballinger Marketing Service	Ballinger, Stewart	0954	757-3439
Baylor Student	James, Harold	8574	755-3948
Crammer Employment Agency	Crammer, Ted	7856	765-2098
Don Stubing, Contractor	Stubing, Don	8907	765-1209
Downing, Inc.	Downing, Cory	9843	765-2341
Dumas Independent Agency	Dumas, Tye	0965	884-2094
Hathaway Plumbing	Hathaway, Tim	8765	765-2398
Henry's Interiors	Henry, Jennifer	6735	756-3298
James Cassidy, Attorney	Cassidy, James	6897	757-0954
James T. Baker, Attorney	Baker, James T.	8735	765-3290
Jane Price, D.D.S.	Price, Jane	3894	752-0945
Jeff Evans, Attorney	Evans, Jeff	3748	881-7943
John's Print Shop	David, John	8765	757-8963
Princeton Mfg.	Princeton, Ed	8964	765-3409
Pumps, Inc.	Stimpson, Dan	3895	753-2050
Smith Medi Center	Smith, James T., MD	6785	767-2389
Spenco Photography	Spenco, Tammy	7645	756-3925
St. James Hospital	Stafford, Terry, Adm.	7654	765-2036
Student	Panque, Jamie	8643	765-3043
Thomas Johnson, M.D.	Johnson, Thomas M.D.	6754	765-3409
Turner Travel Agency	Turner, John P.	9876	765-3409
Waco Sport Club	Swanson, Sam	7643	765-3209
West Maintenance	West, James	3472	765-9063
Williams Interior Design	Williams, Marcy	8768	765-3940
Wylie Real Estate	Wylie, Jim	0987	757-3409

Disk - dBase 3
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Report form clientna to print

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SECRETARIES INCORPORATED
LIST OF CLIENTS
COMPANY OWNERS AND TELEPHONE NUMBERS
CURRENT DATE

COMPANY OWNER	COMPANY NAME	ACCT NO	TELEPHONE
Attaway, Tom	Attaway Marketing Inc.	9876	765-3409
Baker, James T.	James T. Baker, Attorney	8735	765-3290
Baillinger, Stewart	Baillinger Marketing Service	0954	757-3439
Cassidy, James	James Cassidy, Attorney	6897	757-0954
Crammer, Ted	Crammer Employment Agency	7856	765-2098
David, John	John's Print Shop	8765	757-8963
Downing, Cory	Downing, Inc.	9843	765-2341
Dumas, Tye	Dumas Independent Agency	0965	884-2094
Evans, Jeff	Jeff Evans, Attorney	3748	881-7943
Hathaway, Tim	Hathaway Plumbing	8765	765-2398
Henry, Jennifer	Henry's Interiors	6735	756-3298
James, Harold	Baylor Student	8574	755-3948
Johnson, Thomas M.D.	Thomas Johnson, M.D.	6754	765-3409
Panque, Jamie	Student	8643	765-3043
Price, Jane	Jane Price, D.D.S.	3894	752-0945
Prinston, Ed	Prinston Mfg.	8964	765-3409
Smith, James T., MD	Smith Medi Center	6785	767-2389
Spenco, Tammy	Spenco Photography	7645	756-3925
Stafford, Terry, Adm.	St. James Hospital	7654	765-2036
Stimpson, Dan	Pumps, Inc.	3895	753-2050
Stubing, Don	Don Stubing, Contractor	8907	765-1209
Swanson, Sam	Waco Sport Club	7643	765-3209
Turner, John P.	Turner Travel Agency	9876	765-3409
West, James	West Maintenance	3472	765-9063
Williams, Marcy	Williams Interior Design	8768	765-3940
Wylie, Jim	Wylie Real Estate	0987	757-3409

Quake - dBase 3
dBase + Lotus dats Disk
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SECRETARIES INCORPORATED
CLIENT LIST
APHABETIZED BY COMPANY NAME
CURRENT DATE

COMPANY NAME	ADDRESS	CITY	STATE	ZIP CODE
Attaway Marketing Inc.	9876 Bosque	Waco	TX	76710
Ballinger Marketing Service	5973 Broughton	Waco	TX	76710
Baylor Student	2345 Baylor Avenue	Waco	TX	76703
Crammer Employment Agency	3490 Fremont	Waco	TX	76710
Don Stubing, Contractor	2309 Westmerry	Waco	TX	76708
Downing, Inc.	3094 Patricia	Waco	TX	76703
Dumas Independent Agency	3490 Fremont	Bremont	TX	76895
Hathaway Plumbing	3459 S. Valley Mills	Waco	TX	76706
Henry's Interiors	234 Fernwood	Waco	TX	76709
James Cassidy, Attorney	2350 Winsor	Waco	TX	76710
James T. Baker, Attorney	2349 Danville	Waco	TX	76710
Jane Price, D.D.S.	658 Austin Avenue	Waco	TX	76703
Jeff Evans, Attorney	8905 Main	Clifton	TX	76894
John's Print Shop	4598 Main Street	Waco	TX	76708
Joshua's Real Estate	2406 Swinson	Waco	TX	76708
Prinston Mfg.	5320 Loop 340	Waco	TX	76708
Pumps, Inc.	5894 James Street	Waco	TX	76763
Smith Medi Center	1234 Sun Valley	Waco	TX	76710
Spenco Photography	4236 Santa Fe	Waco	TX	76707
St. James Hospital	8954 Westview	Waco	TX	76710
Student	3940 James	Waco	TX	76708
Thomas Johnson, M.D.	3405 Pine Street	Waco	TX	76710
Turner Travel Agency	2349 Fort Street	Waco	TX	76710
Waco Sport Club	4903 Sanger	Waco	TX	76710
West Maintenance	490 Fort Street	Waco	TX	76709
Williams Interior Design	2389 Springer Street	Waco	TX	76710
Wylie Real Estate	5940 West Avenue	Waco	TX	76710

Disk - dBase 3

dBase + Date Disk

use clients (revised)

Report form client to print

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SECRETARIES INCORPORATED
LIST OF CLIENTS
KIND OF WORK
CURRENT DATE

COMPANY NAME	COMPANY OWNER	KIND OF WORK	CUSTOMER
Waco Sport Club	Swanson, Sam	Billings	Monthly
Hathaway Plumbing	Hathaway, Tim	Billings	Monthly
Downing, Inc.	Downing, Cory	Budget	Monthly
Dumas Independent Agency	Dumas, Tye	Client List	Monthly
Crammer Employment Agency	Crammer, Ted	Client List	Monthly
Don Stubing, Contractor	Stubing, Don	Contracts	Weekly
Attaway Marketing Inc.	Attaway, Tom	Correspondence	Monthly
Henry's Interiors	Henry, Jennifer	Correspondence	Monthly
Jeff Evans, Attorney	Evans, Jeff	Dictation	As Needed
James T. Baker, Attorney	Baker, James T.	Dictation	Weekly
St. James Hospital	Stafford, Terry, Adm.	Dictation	Weekly
John's Print Shop	David, John	Draft Typing	Weekly
James Cassidy, Attorney	Cassidy, James	Legal Documents	Weekly
Prinston Mfg.	Prinston, Ed	Letter	Weekly
Jane Price, D.D.S.	Price, Jane	Mailings	Monthly
West Maintenance	West, James	Mailings	Monthly
Joshua's Real Estate	Aaron, Joshua	Mailings	Monthly
Turner Travel Agency	Turner, John P.	Mass Mailings	Weekly
Williams Interior Design	Williams, Marcy	Mass Mailings	Monthly
Spenco Photography	Spenco, Tammy	Mass Mailings	As Needed
Thomas Johnson, M.D.	Johnson, Thomas M.D.	Medical Doc	Weekly
Smith Medi Center	Smith, James T., MD	Medical Doc.	Monthly
Ballinger Marketing Service	Ballinger, Stewart	Temporary	As Needed
Pumps, Inc.	Stimpson, Dan	Temporary	As Needed
Wylie Real Estate	Wylie, Jim	Temporary	As Needed
Student	Panque, Jamie	Term Papers	As Needed
Baylor Student	James, Harold	Term Papers	As Needed

Dists - dBase 3

dBase + Late Date Disk

use clientwork

Report form clientwork to print

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SECRETARIES INCORPORATED
LIST OF CLIENTS
ACCOUNT NUMBERS
CURRENT DATE

COMPANY NAME	COMPANY OWNER	ACCT. NO.
Ballinger Marketing Service	Ballinger, Stewart	0954
Dumas Independent Agency	Dumas, Tye	0965
Wylie Real Estate	Wylie, Jim	0987
West Maintenance	West, James	3472
Jeff Evans, Attorney	Evans, Jeff	3748
Jane Price, D.D.S.	Price, Jane	3894
Pumps, Inc.	Stimpson, Dan	3895
Joshua's Real Estate	Aaron, Joshua	6324
Henry's Interiors	Henry, Jennifer	6735
Thomas Johnson, M.D.	Johnson, Thomas M.D.	6754
Smith Medi Center	Smith, James T., MD	6785
James Cassidy, Attorney	Cassidy, James	6897
Waco Sport Club	Swanson, Sam	7643
Spenco Photography	Spenco, Tammy	7645
St. James Hospital	Stafford, Terry, Adm.	7654
Crammer Employment Agency	Crammer, Ted	7856
Baylor Student	James, Harold	8574
Student	Panque, Jamie	8643
James T. Baker, Attorney	Baker, James T.	8735
Hathaway Plumbing	Hathaway, Tim	8765
John's Print Shop	David, John	8765
Williams Interior Design	Williams, Marcy	8768
Don Stubing, Contractor	Stubing, Don	8907
Prinston Mfg.	Prinston, Ed	8964
Downing, Inc.	Downing, Cory	9843
Turner Travel Agency	Turner, John P.	9875
Attaway Marketing Inc.	Attaway, Tom	9876

Disks - dBase 3

dBase + Letter data Disk

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SECRETARIES INCORPORATED
LIST OF CLIENTS
ACCOUNT NUMBERS
CURRENT DATE

COMPANY NAME	COMPANY OWNER	ACCT. NO.
Attaway Marketing Inc.	Attaway, Tom	9876
Turner Travel Agency	Turner, John P.	9875
Downing, Inc.	Downing, Cory	9843
Prinston Mfg.	Prinston, Ed	8964
Don Stubing, Contractor	Stubing, Don	8907
Williams Interior Design	Williams, Marcy	8768
Hathaway Plumbing	Hathaway, Tim	8765
John's Print Shop	David, John	8765
James T. Baker, Attorney	Baker, James T.	8735
Student	Panque, Jamie	8643
Baylor Student	James, Harold	8574
Crammer Employment Agency	Crammer, Ted	7856
St. James Hospital	Stafford, Terry, Adm.	7654
Spenco Photography	Spenco, Tammy	7645
Waco Sport Club	Swanson, Sam	7643
James Cassidy, Attorney	Cassidy, James	6897
Smith Medi Center	Smith, James T., MD	6785
Thomas Johnson, M.D.	Johnson, Thomas M.D.	6754
Henry's Interiors	Henry, Jennifer	6735
Joshua's Real Estate	Aaron, Joshua	6324
Pumps, Inc.	Stimpson, Dan	3895
Jane Price, D.D.S.	Price, Jane	3894
Jeff Evans, Attorney	Evans, Jeff	3748
West Maintenance	West, James	3472
Wylie Real Estate	Wylie, Jim	0987
Dumas Independent Agency	Dumas, Tye	0965
Ballinger Marketing Service	Ballinger, Stewart	0954

Disks - dBase 3

dBase date Disk

Use cline

Report form cline to print

Job 4--Using Sidekick to Set Up a Calendar and Phone Directory

Part 1 - The following is a printout of Susan's and Jim's calendars. Since specific dates were not given in the Student's Laboratory Guide, the dates will vary depending on the date the student completes this job.

Susan

Dates will vary

Sep	1	1987
10:00a	Mrs. Birdsong	
12:00p	Lunch with Mr. Jones	
04:00p	Staff Meeting	
06:00p	Cub Scouts	
Sep	2	1987
09:00a	Meeting with Jim Jones	
10:00a	Meeting with Lance Scott	
12:00p	Lunch with Don	
04:00p	Meeting with WP People	
Sep	3	1987
08:00a	Work on Budget	
09:00a	Work on Budget	
10:00a	Work on Budget	
11:00a	Work on Budget	
12:00p	Lunch with Mother	
02:00p	Mr. Don Stubing	
04:00p	Staff Meeting	
06:00p	Cub Scotts	

Jim

Dates will vary

Sep	1	1987
08:00a	Work on Budget	
09:00a	Work on Budget	
10:00a	Work on Budget	
11:00a	Work on Budget	
12:00p	Lunch With John Timbers	
Sep	2	1987
09:00a	Meeting With Susan	
12:00p	Lunch with Smitty	
06:00p	Golf with John	
Sep	3	1987
08:00a	Work on Budget with Susan	
09:00a	Work on Budget with Susan	
10:00a	Work on Budget with Susan	
11:00a	Work on Budget with Susan	

Part 2 - The following is a printout of the phone directory created by the student. This directory should be printed using the print function of Sidekick.

John David	757-7963	John's Print Shop
Ed Princeton	767	Princeton Mfg.
James Cassidy	7	Attorney
John Turner	75	Travel Agency
Thomas Johnson		
James Baker		
Terry Stafford		Hospital
Don Stubing		
Tammy Spenco		Photography

Job 5--Creating Bills Using Lotus 1-2-3

The students will need to set up a shell for the bills to call up when billing clients. This sample shows the layout for the bill and the formulas the students should use.

SECRETARIES INCORPORATED
3301 MAIN STREET
WACO, TX 76703

Name:
Address:
City:
Account No.

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	PAYMENTS	BALANCE
				+D12+E12		+F12-G12
				+D13+E13		+H12+F13-G13
				+D14+E14		+H13+F14-G14
				+D15+E15		+H14+F15-G15
				+D16+E16		+H15+F16-G16
				+D17+E17		+H16+F17-G17
				+D18+E18		+H17+F18-G18
				+D19+E19		+H18+F19-G19
				+D20+E20		+H19+F20-G20
				+D21+E21		+H20+F21-G21
				+D22+E22		+H21+F22-G22
				+D23+E23		+H22+F23-G23
				+D24+E24		+H23+F24-G24

Job 6--Creating Spreadsheets for the Clients

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: St. James Hospital
Address: 8954 Westview
City: Waco, TX 76710
Account No. 7654

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
					0.00	0.00	0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Ballinger Marketing Service
Address: 5973 Broughton
City: Waco, TX 76710
Account No. 0954

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
					0.00	0.00	0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Princeton Mfg.
Address: 5320 Loop 340
City: Waco, TX 76708
Account No. 8964

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
					0.00	0.00	0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Turner Travel Agency
Address: 2349 Fort Street
City: Waco, TX 76710
Account No. 9876

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
					0.00	0.00	0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Smith Medi Center
Address: 1234 Sun Valley
City: Waco, TX 76710
Account No. 6897

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 29 87	data base	dBase	2.75	9.00	24.75	0.00	24.75
		PAY THIS AMOUNT			0.00		24.75

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: John's Print Shop
Address: 4598 Main Street
City: Waco, TX 76708
Account No. 8765

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 12 87	Newsletter	DW4	3.00	10.00	30.00	0.00	30.00
MAY 18 87	Report	DW4	2.50	10.00	25.00		55.00
May 30 87					0.00	25.00	30.00
		PAY THIS AMOUNT			0.00		30.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: James T. Baker, Attorney
Address: 2349 Danville
City: Waco, TX 76710
Account No. 8735

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 24 87	Letters	DW4	0.75	10.00	7.50	0.00	7.50
		PAY THIS AMOUNT			0.00		7.50

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Crammer Employment Agency
Address: 3490 Fremont
City: Waco, TX 76710
Account No. 7856

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 14 87	Budget	Lotus	1.75	10.00	17.50	0.00	17.50
		PAY THIS AMOUNT			0.00		17.50

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Wylie Real Estate
Address: 5940 West Avenue
City: Waco, TX 76710
Account No. 0987

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 13 87		DW4	2.75	10.00	27.50	0.00	27.50
		PAY THIS AMOUNT			0.00		27.50

Job 7 -- Creating A Time Sheet

You will want to check the student's disk to make sure she/he used column layout to set up the columns.

The student's worksheet may vary for the following key.

Timesheet for Customer Jobs

Employee's Name _____

[illegible]

*Convert 15 minutes of an hour into 1/4 of an hour.
Example: 15 = .25 30 = .5 45 = .75

Evaluation:

There is no test for this unit. Evaluation will be to check the jobs in this unit.

UNIT 2

USING dBASE 3 AND LOTUS 123

OFT 2402 ADVANCED INFORMATION PROCESSING

INSTRUCTOR'S GUIDE

Unit 2

Unit Title: Jobs using dBase3 and Lotus 1-2-3

Contents of Unit:

1. Create a data base for the clients and employees
2. Edit and append the data base for the clients and employees
3. Create a spreadsheet of the budget for Secretaries Incorporated and The Learning Center
4. Edit the spreadsheet for Secretaries Incorporated and The Learning Center
5. Create a spreadsheet for grades for local teacher
6. Up-date client files in dBase3, clients' billing files in Lotus 1-2-3, and calendar in Sidekick

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Create, edit, append, and print files using a data base management software package.
2. Create, edit, and print a calendar using a desktop management software package.
3. Create, edit, and print spreadsheets using a spreadsheet software package.
4. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor
5. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Handouts for Unit 2

Software: dBase3, Lotus 1-2-3, Sidekick

Hardware: Microcomputer (640K) with two disk drives per student

Disks: Disks containing the completed jobs for dBase3 and Lotus 1-2-3 are available upon request at Galveston College

Procedures:

Simulation

Learning Activities:

Students are to follow instructions given in Student's Laboratory Guide to complete Jobs 1-8 in Unit 2.

Keys for Learning Activities:

The following pages contain the keys for the jobs in Unit 2. The students should be very creative in building the spreadsheets. Therefore, their spreadsheets may vary from those in this Instructor's Guide.

Job 1--Creating and Printing a Data Base for a Private School

It is very important that the students keyboard the last name and then the first name in the name column in order for this file to sort properly.

The student may choose to make an entry for each part of the name. This will be fine; however, their final lists will look different from the key.

Part 1 is a list to print of the file. The students should check this list with you before going any further.

Part 2 is a list of the names, classes, ages, teachers, and coteachers in alphabetic order.

Part 3 is a list of the classes in alphabetic order.

Job 1 Part 1

Record#	NAME	SUBSTITUTE	CLASS	PARENTS	DATE	AGE	TEACHER
1	Davis, Kelli		Kindergarten	Sandra and Glenn	06/02/82	4	Janet Smith
Linda Thompson							
2	Engelbrecht, Bradley		Kindergarten	Sally	11/06/81	5	Janet Smith
Linda Thompson							
3	Jenkins, Todd		Kindergarten	Lynell and Stacy	12/06/81	5	Janet Smith
Linda Thompson							
4	Latham, James		Kindergarten	Nancy and Charles	09/02/82	4	Janet Smith
Linda Thompson							
5	Symank, Jarrod		Kindergarten	Deborah and James	02/06/82	4	Janet Smith
Linda Thompson							
6	Davis, April		1st & 2nd	Sandra and Glen	11/26/80	6	Nancy Latham
Kathy Husak							
7	Fuston, Gary		1st & 2nd	Cynthia	02/12/80	6	Nancy Latham
Kathy Husak							
8	Harness, Jeremy		1st & 2nd	Veronica	05/12/81	5	Nancy Latham
Kathy Husak							
9	Krupicka, Gary		Kindergarten	Annie and Alvin	03/26/81	5	Janet Smith
Linda Thompson							
10	Latham, Charles		1st & 2nd	Nancy and Charles	02/28/80	6	Nancy Latham
Kathy Husak							
11	Ricks, Melinda		Kindergarten	Debbie and Marshall	05/29/81	5	Janet Smith
Linda Thompson							
12	Stanford, Tye		Kindergarten	Linda and Don	07/18/80	6	Janet Smith
Linda Thompson							
13	Brown, Charles		1st & 2nd	Donna and Ronald	04/30/79	7	Nancy Latham
Kathy Husak							
14	Bullington, Scott		3rd & 4th	Sue and Dwight	01/10/78	8	Diane Jones
Jeanie Tipton							
15	Deats, Shelley		1st & 2nd	Jennie and Steve	07/26/79	8	Nancy Latham
Kathy Husak							
16	Ricks, Bradley		3rd & 4th	Debbie and Marshall	08/25/78	8	Diane Jones
Jeanie Tipton							

17 Stanford, Cory	3rd & 4th	05/04/77	9 Diane Jones
Jeanie Tipton	Linda and Don		
18 White, Crystal	1st & 2nd	02/04/79	7 Nancy Latham
Kathy Husak	Dawn		
19 Brown, Melissa	3rd & 4th	12/19/77	9 Diane Jones
Jeanie Tipton	Donna and Ronald		
20 Higginbotham, Jeremy	5th & 6th	11/09/75	11 Alma Zelisko
Sam Johnson	Deborah and James		
21 Jenkins, Melanie	3rd & 4th	05/22/77	9 Diane Jones
Jeanie Tipton	Lynell and Stacy		
22 Deats, Bradley	5th & 6th	06/14/75	11 Alma Zelisko
Sam Johnson	Jennie and Steve		
23 Pinson, Jamie	5th & 6th	11/27/74	12 Alma Zelisko
Sam Johnson	Connie Smith		
24 Higginbotham, Dawn	High School	08/09/72	13 Bill Jones
Debbie Ricks	Deborah and James		
25 Jones, Chad	Jr. High	01/13/73	13 Evelyn McDonald
Tom Simpson	Diane and Bill		
26 Jenkins, Bryan	High School	10/24/71	14 Bill Jones
Debbie Ricks	Lynell and Stacy		
27 Symank, Ryan	Jr. High	10/15/73	12 Evelyn McDonald
Tom Simpson	Deborah and James		
28 Gascamp, Jennifer	High School	06/04/70	16 Bill Jones
Debbie Ricks	Bobbie and Tommy		
29 Jones, Karl	High School	08/12/70	15 Bill Jones
Debbie Ricks	Diane and Bill		
30 Johnson, Jeff	High School	03/08/69	17 Bill Jones
Debbie Ricks	Kay and Bill		
31 Kelm, Michelle	High School	03/02/69	17 Bill Jones
Debbie Ricks	Laura and Albert		
32 Kaiser, Lorri	High School	11/19/69	15 Bill Jones
Debbie Ricks	Judy and Roger		
33 Penson, Danny	High School	10/03/70	15 Bill Jones
Debbie Ricks	Connie		
34 Obr, Dean	High School	04/13/68	18 Bill Jones
Debbie Ricks	Larry		
35 Symank, Stephanie	High School	03/11/68	18 Bill Jones
Debbie Ricks	Joyce and Charles		
36 Gascamp, Larry	High School	07/13/67	19 Bill Jones
Debbie Ricks	Bobbie and Tommie		
37 Kaulfus, Carol	High School	09/04/70	17 Bill Jones
Debbie Ricks	Dell and Bill		
38 Kelm, Darrel	High School	08/06/65	18 Bill Jones
Debbie Ricks	Laura and Albert		
39 Haferkamp, Jessica	Nursery	06/22/85	2 Jennifer Thomas
Susie White	Josephine and Elmo		
40 Carbuhn, Aaron	Nursery	12/14/85	2 Jennifer Thomas
Susie White	Shirley		
41 Phillips, Joshua	Nursery	05/23/86	1 Jennifer Thomas
Susie White	Denise		

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THE LEARNING CENTER
LIST OF STUDENT BODY
CURRENT DATE

NAME	CLASS	AGE	TEACHER	COTEACHER
Davis, Kelli	Kindergarten	4	Janet Smith	Linda Thompson
Engelbrecht, Bradley	Kindergarten	5	Janet Smith	Linda Thompson
Jenkins, Todd	Kindergarten	5	Janet Smith	Linda Thompson
Latham, James	Kindergarten	4	Janet Smith	Linda Thompson
Symank, Jarrod	Kindergarten	4	Janet Smith	Linda Thompson
Davis, April	1st & 2nd	6	Nancy Latham	Kathy Husak
Fuston, Gary	1st & 2nd	6	Nancy Latham	Kathy Husak
Harness, Jeremy	1st & 2nd	5	Nancy Latham	Kathy Husak
Krupicka, Gary	Kindergarten	5	Janet Smith	Linda Thompson
Latham, Charles	1st & 2nd	6	Nancy Latham	Kathy Husak
Ricks, Melinda	Kindergarten	5	Janet Smith	Linda Thompson
Stanford, Tye	Kindergarten	6	Janet Smith	Linda Thompson
Brown, Charles	1st & 2nd	7	Nancy Latham	Kathy Husak
Bullington, Scott	3rd & 4th	8	Diane Jones	Jeanie Tipton
Deats, Shelley	1st & 2nd	8	Nancy Latham	Kathy Husak
Ricks, Bradley	3rd & 4th	8	Diane Jones	Jeanie Tipton
Stanford, Cory	3rd & 4th	9	Diane Jones	Jeanie Tipton
White, Crystal	1st & 2nd	7	Nancy Latham	Kathy Husak
Brown, Melissa	3rd & 4th	9	Diane Jones	Jeanie Tipton
Higginbotham, Jeremy	5th & 6th	11	Alma Zelisko	Sam Johnson
Jenkins, Melanie	3rd & 4th	9	Diane Jones	Jeanie Tipton
Deats, Bradley	5th & 6th	11	Alma Zelisko	Sam Johnson
Pinson, Jamie	5th & 6th	12	Alma Zelisko	Sam Johnson
Higginbotham, Dawn	High School	13	Bill Jones	Debbie Ricks
Jones, Chad	Jr. High	13	Evelyn McDonald	Tom Simpson
Jenkins, Bryan	High School	14	Bill Jones	Debbie Ricks
Symank, Ryan	Jr. High	12	Evelyn McDonald	Tom Simpson
Gascamp, Jennifer	High School	16	Bill Jones	Debbie Ricks
Jones, Karl	High School	15	Bill Jones	Debbie Ricks
Johnson, Jeff	High School	17	Bill Jones	Debbie Ricks
Kelm, Michelle	High School	17	Bill Jones	Debbie Ricks
Kaiser, Lorri	High School	15	Bill Jones	Debbie Ricks
Penson, Danny	High School	15	Bill Jones	Debbie Ricks
Obr, Dean	High School	18	Bill Jones	Debbie Ricks
Symank, Stephanie	High School	18	Bill Jones	Debbie Ricks
Gascamp, Larry	High School	19	Bill Jones	Debbie Ricks
Kaulfus, Carol	High School	17	Bill Jones	Debbie Ricks
Kelm, Darrel	High School	18	Bill Jones	Debbie Ricks
Haferkamp, Jessica	Nursery	2	Jennifer Thomas	Susie White
Carbuhn, Aaron	Nursery	2	Jennifer Thomas	Susie White
Phillips, Joshua	Nursery	1	Jennifer Thomas	Susie White

Disks - dBase 3

dBase data disk

use ssclass

Report form dreport to print

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THE LEARNING CENTER
LIST OF STUDENT BODY
CURRENT DATE

NAME	CLASS	AGE	TEACHER	COTEACHER
Brown, Charles	1st & 2nd	7	Nancy Latham	Kathy Husak
Davis, April	1st & 2nd	6	Nancy Latham	Kathy Husak
Deats, Shelley	1st & 2nd	8	Nancy Latham	Kathy Husak
Fuston, Gary	1st & 2nd	6	Nancy Latham	Kathy Husak
Harness, Jeremy	1st & 2nd	5	Nancy Latham	Kathy Husak
Latham, Charles	1st & 2nd	6	Nancy Latham	Kathy Husak
White, Crystal	1st & 2nd	7	Nancy Latham	Kathy Husak
Brown, Melissa	3rd & 4th	9	Diane Jones	Jeanie Tipton
Jenkins, Melanie	3rd & 4th	9	Diane Jones	Jeanie Tipton
Ricks, Bradley	3rd & 4th	8	Diane Jones	Jeanie Tipton
Stanford, Cory	3rd & 4th	9	Diane Jones	Jeanie Tipton
Bullington, Scott	3rd & 4th	8	Diane Jones	Jeanie Tipton
Deats, Bradley	5th & 6th	11	Alma Zelisko	Sam Johnson
Higginbotham, Jeremy	5th & 6th	11	Alma Zelisko	Sam Johnson
Pinson, Jamie	5th & 6th	12	Alma Zelisko	Sam Johnson
Gascamp, Jennifer	High School	16	Bill Jones	Debbie Ricks
Gascamp, Larry	High School	19	Bill Jones	Debbie Ricks
Higginbotham, Dawn	High School	13	Bill Jones	Debbie Ricks
Jenkins, Bryan	High School	14	Bill Jones	Debbie Ricks
Johnson, Jeff	High School	17	Bill Jones	Debbie Ricks
Jones, Karl	High School	15	Bill Jones	Debbie Ricks
Kaiser, Lorri	High School	15	Bill Jones	Debbie Ricks
Kaulfus, Carol	High School	17	Bill Jones	Debbie Ricks
Kelm, Darrel	High School	18	Bill Jones	Debbie Ricks
Kelm, Michelle	High School	17	Bill Jones	Debbie Ricks
Obr, Dean	High School	18	Bill Jones	Debbie Ricks
Penson, Danny	High School	15	Bill Jones	Debbie Ricks
Sybank, Stephanie	High School	18	Bill Jones	Debbie Ricks
Jones, Chad	Jr. High	13	Evelyn McDonald	Tom Simpson
Sybank, Ryan	Jr. High	12	Evelyn McDonald	Tom Simpson
Davis, Kelli	Kindergarten	4	Janet Smith	Linda Thompson
Engelbrecht, Bradley	Kindergarten	5	Janet Smith	Linda Thompson
Jenkins, Todd	Kindergarten	5	Janet Smith	Linda Thompson
Krupicka, Gary	Kindergarten	5	Janet Smith	Linda Thompson
Latham, James	Kindergarten	4	Janet Smith	Linda Thompson
Ricks, Melinda	Kindergarten	5	Janet Smith	Linda Thompson
Stanford, Tye	Kindergarten	6	Janet Smith	Linda Thompson
Sybank, Jarrod	Kindergarten	4	Janet Smith	Linda Thompson
Carbuhn, Aaron	Nursery	2	Jennifer Thomas	Susie White
Haferkamp, Jessica	Nursery	2	Jennifer Thomas	Susie White
Phillips, Joshua	Nursery	1	Jennifer Thomas	Susie White

disks - dbase 3 + dBase date disk
use SS dept
Report form SS report to print

This key shows the formulas for this job.

SECRETARIES INC
BUDGET FOR 1987

BUDGET ITEMS	LAST MONTH
Beginning Balance	50234.76
Income:	
Temporary Earnings	33034.34
Free-Lance Earnings	24324.96
TOTAL EARNINGS	+B8+B9
BALANCE + INCOME	+B5+B10
Expenses:	
Management Salaries	25045.34
Employee Salaries	57098.45
Advertising	503.34
Building Lease	340.23
Office Supplies	109.34
Office Equipment	4423.09
Liability Bond	450
Utilities	134.56
Phone Service	57.34
FICA Taxes	4325.34
SS Taxes	1090.45
Education	56.4
Miscellaneous	23.45
TOTAL EXPENSES	@SUM(B15..B27)
NET LOSS/GAIN	+B12-B28

SECRETARIES INCORPORATED
BUDGET FOR 1987

BUDGET ITEMS	LAST MONTH
Beginning Balance	\$50,234.76
Income:	
Temporary Earnings	\$33,034.34
Free-Lance Earnings	\$24,324.96
TOTAL EARNINGS	\$57,359.30
BALANCE + INCOME	\$107,594.06
Expenses:	
Management Salaries	\$25,045.34
Employee Salaries	\$57,098.45
Advertising	\$503.34
Building Lease	\$340.23
Office Supplies	\$109.34
Office Equipment	\$4,423.09
Liability Bond	\$450.00
Utilities	\$134.56
Phone Service	\$57.34
FICA Taxes	\$4,325.34
SS Taxes	\$1,090.45
Education	\$56.40
Miscellaneous	\$23.45
TOTAL EXPENSES	\$93,657.33
NET LOSS/GAIN	\$13,936.73

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THE LEARNING CENTER
LIST OF STUDENT BODY
CURRENT DATE

NAME	CLASS	AGE	TEACHER	COTEACHER
Davis, Kelli	Kindergarten	5	Janet Smith	Willie James
Engelbrecht, Bradley	Kindergarten	5	Janet Smith	Willie James
Jenkins, Todd	Kindergarten	5	Janet Smith	Willie James
Latham, James	Kindergarten	5	Janet Smith	Willie James
Symank, Jarrod	Kindergarten	5	Janet Smith	Willie James
Davis, April	1st & 2nd	6	Jenny Adams	Johnny Huse
Fuston, Gary	1st & 2nd	7	Jenny Adams	Johnny Huse
Krupicka, Gary	Kindergarten	6	Janet Smith	Willie James
Latham, Charles	1st & 2nd	7	Jenny Adams	Johnny Huse
Ricks, Melinda	1st & 2nd	6	Jenny Adams	Johnny Huse
Stanford, Tye	1st & 2nd	6	Jenny Adams	Johnny Huse
Brown, Charles	3rd & 4th	8	Diane Jones	Jeanie Tipton
Bullington, Scott	3rd & 4th	8	Diane Jones	Jeanie Tipton
Deats, Shelley	3rd & 4th	9	Diane Jones	Jeanie Tipton
Ricks, Bradley	3rd & 4th	8	Diane Jones	Jeanie Tipton
Stanford, Cory	3rd & 4th	10	Diane Jones	Jeanie Tipton
White, Crystal	1st & 2nd	8	Jenny Adams	Johnny Huse
Brown, Melissa	5th & 6th	9	John Crammer	Sam Johnson
Higginbotham, Jeremy	5th & 6th	11	John Crammer	Sam Johnson
Jenkins, Melanie	5th & 6th	10	John Crammer	Sam Johnson
Deats, Bradley	Jr. High	11	Evelyn McDonald	Tom Simpson
Higginbotham, Dawn	High School	14	Bill Jones	Debbie Ricks
Jones, Chad	High School	13	Bill Jones	Debbie Ricks
Jenkins, Bryan	High School	15	Bill Jones	Debbie Ricks
Symank, Ryan	Jr. High	13	Evelyn McDonald	Tom Simpson
Gascamp, Jennifer	High School	16	Bill Jones	Debbie Ricks
Jones, Karl	High School	16	Bill Jones	Debbie Ricks
Johnson, Jeff	High School	17	Bill Jones	Debbie Ricks
Kelm, Michelle	High School	18	Bill Jones	Debbie Ricks
Kaiser, Lorri	High School	16	Bill Jones	Debbie Ricks
Penson, Danny	High School	15	Bill Jones	Debbie Ricks
Obr, Dean	High School	18	Bill Jones	Debbie Ricks
Symank, Stephanie	High School	18	Bill Jones	Debbie Ricks
Kaulfus, Carol	High School	18	Bill Jones	Debbie Ricks
Kelm, Darrel	High School	18	Bill Jones	Debbie Ricks
Haferkamp, Jessica	Nursery	2	Jennifer Thomas	Susie White
Carbuhn, Aaron	Nursery	3	Jennifer Thomas	Susie White
Phillips, Joshua	Nursery	2	Jennifer Thomas	Susie White
Elmore, Jeremy	Jr. High	13	Evelyn McDonald	Tom Simpson
Miller, Sandy	Kindergarten	3	Janet Smith	Willie James

Disks - dBase 3 and dBase data disks
use software. Revised with additions, deletions + edits
Report form & Report to print

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THE LEARNING CENTER
LIST OF STUDENT BODY
CURRENT DATE

NAME	CLASS	AGE	TEACHER	COTEACHER
Davis, April	1st & 2nd	6	Jenny Adams	Johnny Huse
Fuston, Gary	1st & 2nd	7	Jenny Adams	Johnny Huse
Latham, Charles	1st & 2nd	7	Jenny Adams	Johnny Huse
Ricks, Melinda	1st & 2nd	6	Jenny Adams	Johnny Huse
Stanford, Tye	1st & 2nd	6	Jenny Adams	Johnny Huse
White, Crystal	1st & 2nd	8	Jenny Adams	Johnny Huse
Brown, Charles	3rd & 4th	8	Diane Jones	Jeanie Tipton
Bullington, Scott	3rd & 4th	8	Diane Jones	Jeanie Tipton
Deats, Shelley	3rd & 4th	9	Diane Jones	Jeanie Tipton
Ricks, Bradley	3rd & 4th	8	Diane Jones	Jeanie Tipton
Stanford, Cory	3rd & 4th	10	Diane Jones	Jeanie Tipton
Brown, Melissa	5th & 6th	9	John Crammer	Sam Johnson
Higginbotham, Jeremy	5th & 6th	11	John Crammer	Sam Johnson
Jenkins, Melanie	5th & 6th	10	John Crammer	Sam Johnson
Gascomp, Jennifer	High School	16	Bill Jones	Debbie Ricks
Higginbotham, Dawn	High School	14	Bill Jones	Debbie Ricks
Jenkins, Bryan	High School	15	Bill Jones	Debbie Ricks
Johnson, Jeff	High School	17	Bill Jones	Debbie Ricks
Jones, Chad	High School	13	Bill Jones	Debbie Ricks
Jones, Karl	High School	16	Bill Jones	Debbie Ricks
Kaiser, Lorri	High School	16	Bill Jones	Debbie Ricks
Kaulfus, Carol	High School	18	Bill Jones	Debbie Ricks
Kelm, Darrel	High School	18	Bill Jones	Debbie Ricks
Kelm, Michelle	High School	18	Bill Jones	Debbie Ricks
Obr, Dean	High School	18	Bill Jones	Debbie Ricks
Penson, Danny	High School	15	Bill Jones	Debbie Ricks
Symank, Stephanie	High School	18	Bill Jones	Debbie Ricks
Deats, Bradley	Jr. High	11	Evelyn McDonald	Tom Simpson
Elmore, Jeremy	Jr. High	13	Evelyn McDonald	Tom Simpson
Symank, Ryan	Jr. High	13	Evelyn McDonald	Tom Simpson
Davis, Kelli	Kindergarten	5	Janet Smith	Willie James
Engelbrecht, Bradley	Kindergarten	5	Janet Smith	Willie James
Jenkins, Todd	Kindergarten	5	Janet Smith	Willie James
Krupicka, Gary	Kindergarten	6	Janet Smith	Willie James
Latham, James	Kindergarten	5	Janet Smith	Willie James
Miller, Sandy	Kindergarten	3	Janet Smith	Willie James
Symank, Jarrod	Kindergarten	5	Janet Smith	Willie James
Carbuhn, Aaron	Nursery	3	Jennifer Thomas	Susie White
Haferkamp, Jessica	Nursery	2	Jennifer Thomas	Susie White
Phillips, Joshua	Nursery	2	Jennifer Thomas	Susie White

*Disks - dBase 3 and dBase data disk
Use sedit - revised with additions, deletions, and edits
Report Form as report to parent*

THE LEARNING CENTER
ADOPTED BUDGET FOR 1987

BUDGETED ITEMS	LAST YEAR	1987
SALARIES EXPENSE:		
Management Salaries	\$60,469.00	\$65,667.00
Teacher Salaries	\$250,750.00	\$300,475.00
Maintenance Salaries	\$45,075.00	\$55,376.00
FICA Taxes	\$24,888.00	\$29,506.00
Social Security Taxes	\$28,444.00	\$33,721.00
TOTAL	\$381,182.00	\$451,024.00
PROFESSIONAL DEVELOPMENT EXPENSES:		
Workshops	\$50,765.00	\$65,076.00
Conferences	\$120,875.00	\$130,700.00
Travel	\$45,700.00	\$50,500.00
Overnight Accommodations	\$125,000.00	\$135,500.00
Miscellaneous	\$25,000.00	\$35,000.00
TOTAL	\$367,340.00	\$416,776.00
SUPPLIES EXPENSES:		
Books	\$250,700.00	\$300,500.00
Paper for Copy Machine	\$5,000.00	\$5,500.00
Office Supplies	\$3,575.00	\$4,575.00
TOTAL	\$259,275.00	\$310,575.00
BUILDING EXPENSES:		
Equipment Maintenance	\$55,700.00	\$60,500.00
Supplies for Cleaning	\$2,500.00	\$3,750.00
Supplies for Equipment	\$10,700.00	\$12,550.00
TOTAL	\$68,900.00	\$76,800.00
MISCELLANEOUS EXPENSES:		
Insurance	\$45,000.00	\$75,000.00
Advertising	\$6,500.00	\$7,425.00
Liability Bond	\$7,670.00	\$7,825.00
Utilities	\$125,745.00	\$145,890.00
Phone Service	\$41,247.00	\$42,500.00
Texan	\$10,746.00	\$15,740.00
Miscellaneous	\$1,500.00	\$1,800.00
TOTAL	\$238,408.00	\$296,180.00
TOTAL EXPENSES	\$1,315,105.00	\$1,551,355.00

SECRETARIES INCORPORATED
BUDGET FOR 1987

BUDGET ITEMS	LAST MONTH		
Beginning Balance	50226.76		
Income:			
Temporary Earnings	33034.34		
Free-Lance Earnings	24324.96		
TOTAL EARNINGS	57359.30	0.00	0.00
BALANCE + INCOME	107586.06	0.00	0.00
Expenses:			
Management Salaries	25054.34		
Employee Salaries	57098.45		
Advertising	503.34		
Building Lease	340.00		
Office Supplies	109.34		
Office Equipment	4423.09		
Insurance	96.50		
Liability Bond	250.00		
Utilities	134.56		
Answering Service	125.00		
Phone Service	57.34		
FICA Taxes	4325.34		
SS Taxes	1090.45		
Education	56.40		
TOTAL EXPENSES	93664.15	0.00	0.00
NET LOSS/GAIN	13921.91	0.00	0.00

Mrs. Birdsong
History
Waco High School

Name	E1	E2	E3	E4	TEG	T1	T2	T3	T4	TTG	FINAL
Smith, Susie	87	55	67	90	74.75	87	56	87	93	80.75	77.75
Thompson, John	88	56	78	86	77.00	87	98	86	77	87.00	82.00
Bates, Frank	77	76	65	87	76.25	66	56	86	97	76.25	76.25
Seale, Tim	99	87	76	93	88.75	73	82	94	97	86.50	87.63
Gates, Jenny	64	74	42	87	66.75	54	75	54	76	64.75	65.75
Sims, Dan	87	94	81	87	87.25	89	78	67	49	70.75	79.00
James, Ron	45	83	74	62	66.00	81	82	73	88	81.00	73.50
Sarton, Bebe	86	75	96	98	88.75	96	85	95	96	93.00	90.88
Johnson, Jamie	98	76	84	85	85.75	97	75	84	83	84.75	85.25
Henry, John	97	64	53	42	64.00	74	64	73	83	73.50	68.75
Average	75	67	65	74	70	73	68	73	76	73	72

Unit 2 Job 6 Part 2

Mrs. Birdsong
History
Waco High School

Name	E1	E2	E3	E4	TEG	T1	T2	T3	T4	TTG	FINAL
Bates, Frank	77	76	65	87	76.25	66	56	86	97	76.25	76.25
Gates, Jenny	64	74	42	87	66.75	54	75	54	76	64.75	65.75
Henry, John	97	64	53	42	64.00	74	64	73	83	73.50	68.75
James, Ron	45	83	74	62	66.00	81	82	73	88	81.00	73.50
Johnson, Jamie	98	76	84	85	85.75	97	75	84	83	84.75	85.25
Sarton, Bebe	86	75	96	98	88.75	96	85	95	96	93.00	90.88
Seale, Tim	99	87	76	93	88.75	73	82	94	97	86.50	87.63
Sims, Dan	87	94	81	87	87.25	89	78	67	49	70.75	79.00
Smith, Susie	87	55	67	90	74.75	87	56	87	93	80.75	77.75
Thompson, John	88	56	78	86	77.00	87	98	86	77	87.00	82.00
Average	83	74	72	82	77	80	75	80	84	80	79

THE LEARNING CENTER
ADOPTED BUDGET FOR 1987

BUDGETED ITEMS	LAST YEAR	1987
SALARIES EXPENSE:		
Management Salaries	\$60,469.00	\$65,667.00
Teacher Salaries	\$250,750.00	\$300,475.00
Maintenance Salaries	\$45,075.00	\$55,376.00
FICA Taxes	\$24,888.00	\$29,506.00
Social Security Taxes	\$28,444.00	\$33,700.00
TOTAL	\$381,128.00	\$451,024.00
PROFESSIONAL DEVELOPMENT EXPENSES:		
Workshops	\$50,765.00	\$65,076.00
Conferences	\$120,875.00	\$130,700.00
Travel	\$45,700.00	\$50,500.00
Overnight Accommodations	\$125,000.00	\$130,000.00
Miscellaneous	\$25,000.00	\$35,000.00
TOTAL	\$367,340.00	\$411,276.00
SUPPLIES EXPENSES:		
Books	\$250,070.00	\$300,500.00
Paper for Copy Machine	\$5,000.00	\$5,500.00
Office Supplies	\$3,575.00	\$4,575.00
TOTAL	\$258,645.00	\$310,575.00
BUILDING EXPENSES:		
Equipment	\$150,000.00	\$170,736.00
Equipment Mainenance	\$55,700.00	\$60,500.00
Supplies for Cleaning	\$2,500.00	\$3,750.00
Supplies for Equipment	\$10,700.00	\$12,550.00
TOTAL	\$218,900.00	\$247,536.00
MISCELLANEOUS EXPENSES:		
Insurance	\$45,000.00	\$75,000.00
Advertising	\$6,500.00	\$7,425.00
Utilities	\$125,745.00	\$145,890.00
Phone Service	\$41,247.00	\$42,500.00
Texan	\$10,746.00	\$15,740.00
Miscellaneous	\$1,500.00	\$1,800.00
TOTAL	\$230,738.00	\$288,355.00
TOTAL EXPENSES	\$1,456,751.00	\$1,708,766.00

Mrs. Birdsong
History
Waco High School

Name	E1	E2	E3	E4	E5	E6	TEG	T1	T2	T3	T4	T5	T6	TTG	FINAL
Bates, Frank	77	76	65	87	86	89	80.00	66	56	86	97	92	93	81.67	80.83
Gates, Jenny	64	74	42	87	62	85	69.00	54	75	54	76	83	81	70.50	69.75
Henry, John	97	64	53	42	90	92	73.00	74	64	73	83	86	91	78.50	75.75
James, Ron	45	83	74	62	56	86	67.67	81	82	73	88	63	77	77.33	72.50
Johnson, Jamie	98	76	84	85	56	76	79.17	97	75	84	83	87	82	84.67	81.92
Sarton, Bebe	86	75	96	98	81	86	87.00	96	85	95	96	94	87	92.17	89.58
Seale, Tim	99	87	76	93	87	84	87.67	73	82	94	97	86	94	87.67	87.67
Sims, Dan	87	94	81	87	91	92	88.67	89	78	67	49	87	89	76.50	82.58
Smith, Susie	87	55	67	90	96	76	78.50	87	56	87	93	84	56	77.17	77.83
Thompson, John	88	56	78	86	87	36	71.83	87	98	86	77	42	87	79.50	75.67
Average	83	74	72	82	79	80	78	80	75	80	84	80	84	81	79

Jim
Sep 8 1987
09:00a Meeting with John
12:00p Lunch with Smitty
04:00p Staff Meeting
06:00p Cub Scouts

*Dates
will
vary*

Susan
Sep 8 1987
09:00a Meeting with James Cassidy
10:00a Meeting with Tim Hathaway
11:30a Lance Scott
12:00p Lunch with Don
01:30p Meeting with John Turner
04:00p Staff meeting
06:00p Cub Scouts

Unit 2 Job 9 Part 3

John Turner called to tell you he cannot make his appointment today. He has rescheduled for tomorrow at the same time.

"message may vary"

*Dates
will
vary*

Sep	8	1987
09:00a	Meeting with James Cassidy	
10:00a	Meeting with Tim Hathaway	
11:30a	Lance Scott	
12:00p	Lunch with Don	
04:00p	Staff meeting	
06:00p	Cub Scouts	

Sep	9	1987
01:30p	Meeting with John Turner	

Unit 2 Job 9 Part 5

Dec		48.0000
- Hex	Mem	Numeric -
A B	R C	= 7 8 9 -
F5 F6	M +.-	/ 4 5 6
C D	* /	
F7 F8	Modes	
E F	Dec	* 1 2 3 +
F9 F10	Bin	
	Hex	0 .
And	Or	Xor
		C CE

Updating Company Files:

The students added two new clients to the client data base; therefore, they will need to print out all of the report forms for the client file as given in Unit 1.

The handwritten notes under the printouts indicate the name of the filed used and the name of the report form used.

dBase3 Client File--Sorted by Company Name showing Company
Name, Address, City, State, and Zip Code

Page No. 1
08/14/87

SECRETARIES INCORPORATED
CLIENT LIST
ALPHABETIZED BY COMPANY NAME
CURRENT DATE

COMPANY NAME	ADDRESS	CITY	STATE	ZIP CODE
Attaway Marketing Inc.	9876 Bosque	Waco	TX	76710
Baillinger Marketing Service	5973 Broughton	Waco	TX	76710
Baylor Student	2345 Baylor Avenue	Waco	TX	76703
Cramer Employment Agency	3490 Fremont	Waco	TX	76710
Don Stubing, Contractor	2309 Westmerry	Waco	TX	76708
Downing, Inc.	3094 Patricia	Waco	TX	76703
Dumas Independent Agency	3490 Fremont	Bremont	TX	76895
Hathaway Plumbing	3459 S. Valley Mills	Waco	TX	76706
Henry's Interiors	234 Fernwood	Waco	TX	76709
James Cassidy, Attorney	2350 Winsor	Waco	TX	76710
James T. Baker, Attorney	2349 Danville	Waco	TX	76710
Jane Price, D.D.S.	658 Austin Avenue	Waco	TX	76703
Jeff Evans, Attorney	8905 Main	Clifton	TX	76894
John's Print Shop	4598 Main Street	Waco	TX	76708
Joshua's Real Estate	2406 Swinson	Waco	TX	76708
Prinston Mfg.	5320 Loop 340	Waco	TX	76708
Pumps, Inc.	5894 James Street	Waco	TX	76763
Smith Medi Center	1234 Sun Valley	Waco	TX	76710
Spenco Photography	4236 Santa Fe	Waco	TX	76707
St. James Hospital	8954 Westview	Waco	TX	76710
Student	3940 James	Waco	TX	76708
*The Learning Center	4102 Columbus	Waco	TX	76703
Thomas Johnson, M.D.	3405 Pine Street	Waco	TX	76710
Turner Travel Agency	2349 Fort Street	Waco	TX	76710
*Waco High School	1201 Lake Air	Waco	TX	76710
Waco Sport Club	4903 Sanger	Waco	TX	76710
West Maintenance	490 Fort Street	Waco	TX	76709
Williams Interior Design	2389 Springer Street	Waco	TX	76710
Wylie Real Estate	5940 West Avenue	Waco	TX	76710

*added records

use client no - revised

Report Form clean to print

dBase3 Client File--Sorted by Company Name showing Company
Name, Company Owner, Acct. No., and Telephone

Page No. 1
06/14/87

SECRETARIES INCORPORATED
LIST OF CLIENTS
ALPHABETIZED BY NAME OF COMPANY
CURRENT DATE

COMPANY NAME	COMPANY OWNER	ACCT NO	TELEPHONE
Attaway Marketing Inc.	Attaway, Tom	9875	765-3409
Ballinger Marketing Service	Ballinger, Stewart	0954	757-3439
Baylor Student	James, Harold	8574	755-3948
Crammer Employment Agency	Crammer, Ted	7856	765-2098
Don Stubing, Contractor	Stubing, Don	8907	765-1209
Downing, Inc.	Downing, Cory	9843	765-2341
Dumas Independent Agency	Dumas, Tye	0985	884-2094
Hathaway Plumbing	Hathaway, Tim	8765	765-2398
Henry's Interiors	Henry, Jennifer	6735	756-3298
James Cassidy, Attorney	Cassidy, James	6897	757-3674
James T. Baker, Attorney	Baker, James T.	8735	765-3290
Jane Price, D.D.S.	Price, Jane	3894	752-0945
Jeff Evans, Attorney	Evans, Jeff	3748	881-7943
John's Print Shop	David, John	8765	757-8963
Joshua's Real Estate	Aaron, Joshua	6324	752-8372
Prinston Mfg.	Prinston, Ed	8964	765-3409
Pumps, Inc.	Stimpson, Dan	3895	753-2050
Smith Medi Center	Smith, James T., MD	6785	767-2389
Spenco Photography	Spenco, Tammy	7645	756-3925
St. James Hospital	Stafford, Terry, Adm.	7654	765-2036
Student	Panque, Jamie	8643	765-3043
*The Learning Center	Jones, Donald	9877	757-3497
Thomas Johnson, M.D.	Johnson, Thomas M.D.	6754	765-3409
Turner Travel Agency	Turner, John P.	9876	765-3409
*Waco High School	Birdsong, Carol	9878	772-8429
Waco Sport Club	Swanson, Sam	7643	765-3209
West Maintenance	West, James	3472	765-9063
Williams Interior Design	Williams, Marcy	8768	765-3940
Wylie Real Estate	Wylie, Jim	0987	757-3409

* new records

use clients

Report from clients to print

dBase3 Client File--Sorted by Company Owner showing Company Owner, Company Name, Acct. No., and Telephone

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06/14/87

SECRETARIES INCORPORATED
LIST OF CLIENTS
COMPANY OWNERS AND TELEPHONE NUMBERS
CURRENT DATE

COMPANY OWNER	COMPANY NAME	ACCT NO	TELEPHONE
Aaron, Joshua	Joshua's Real Estate	6324	752-8372
Attaway, Tom	Attaway Marketing Inc.	9875	765-3409
Baker, James T.	James T. Baker, Attorney	8735	765-3290
Ballinger, Stewart	Ballinger Marketing Service	0954	757-3439
*Birdsong, Carol	Waco High School	9878	772-8429
Cassidy, James	James Cassidy, Attorney	6897	757-3674
Crammer, Ted	Crammer Employment Agency	7856	765-2098
David, John	John's Print Shop	8765	757-8963
Downing, Cory	Downing, Inc.	9843	765-2341
Dumas, Tye	Dumas Independent Agency	0965	884-2094
Evans, Jeff	Jeff Evans, Attorney	3748	881-7943
Hathaway, Tim	Hathaway Plumbing	8765	765-2398
Henry, Jennifer	Henry's Interiors	6735	756-3298
James, Harold	Baylor Student	8574	755-3948
Johnson, Thomas M.D.	Thomas Johnson, M.D.	6754	765-3409
*Jones, Donald	The Learning Center	9877	757-3497
Panque, Jamie	Student	8643	765-3043
Price, Jane	Jane Price, D.D.S.	3894	752-0945
Princeton, Ed	Princeton Mfg.	8964	765-3409
Smith, James T., MD	Smith Medi Center	6785	767-2389
Spenco, Tammy	Spenco Photography	7645	756-3925
Stafford, Terry, Adm.	St. James Hospital	7654	765-2036
Stimpson, Dan	Pumps, Inc.	3895	753-2050
Stubing, Don	Don Stubing, Contractor	8907	765-1209
Swanson, Sam	Waco Sport Club	7643	765-3209
Turner, John P.	Turner Travel Agency	9876	765-3409
West, James	West Maintenance	3472	765-9063
Williams, Marcy	Williams Interior Design	8768	765-3940
Wylie, Jim	Wylie Real Estate	0987	757-3409

* New Records
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Report form clowner to print

dBase3 Client File--Sorted by Kind of Work showing Company Name, Company Owner, Kind of Work, and Customer

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SECRETARIES INCORPORATED
LIST OF CLIENTS
KIND OF WORK
CURRENT DATE

COMPANY NAME	COMPANY OWNER	KIND OF WORK	CUSTOMER
Hathaway Plumbing	Hathaway, Tim	Billings	Monthly
Waco Sport Club	Swanson, Sam	Billings	Monthly
Downing, Inc.	Downing, Cory	Budget	Monthly
Cramer Employment Agency	Cramer, Ted	Client List	Monthly
Dumas Independent Agency	Dumas, Tye	Client List	Monthly
Don Stubing, Contractor	Stubing, Don	Contracts	Weekly
Henry's Interiors	Henry, Jennifer	Correspondence	Monthly
Attaway Marketing Inc.	Attaway, Tom	Correspondence	Monthly
*The Learning Center	Jones, Donald	Dbase & spread	Weekly
Jeff Evans, Attorney	Evans, Jeff	Dictation	As Needed
James T. Baker, Attorney	Baker, James T.	Dictation	Weekly
St. James Hospital	Stafford, Terry, Adm.	Dictation	Weekly
John's Print Shop	David, John	Draft Typing	Weekly
James Cassidy, Attorney	Cassidy, James	Legal Documents	Weekly
Princeton Mfg.	Princeton, Ed	Letter	Weekly
West Maintenance	West, James	Mailings	Monthly
Jane Price, D.D.S.	Price, Jane	Mailings	Monthly
Joshua's Real Estate	Aaron, Joshua	Mailings	Monthly
Spenco Photography	Spenco, Tamy	Mass Mailings	As Needed
Williams Interior Design	Williams, Marcy	Mass Mailings	Monthly
Turner Travel Agency	Turner, John P.	Mass Mailings	Weekly
Thomas Johnson, M.D.	Johnson, Thomas M.D.	Medical Doc	Weekly
Smith Medi Center	Smith, James T., MD	Medical Doc.	Monthly
*Waco High School	Birdsong, Carol	Spreadsheet	As Needed
Pumps, Inc.	Stimpson, Dan	Temporary	As Needed
Wylie Real Estate	Wylie, Jim	Temporary	As Needed
Ballinger Marketing Service	Ballinger, Stewart	Temporary	As Needed
Student	Panque, Jamie	Term Papers	As Needed
Baylor Student	James, Harold	Term Papers	As Needed

New Records

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Report from clunk to print

dBase3 Client File--Sorted by Acct. No. in ascending order
showing Company Name, Company Owner, and Acct. No.

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SECRETARIES INCORPORATED
LIST OF CLIENTS
ACCOUNT NUMBERS
CURRENT DATE

COMPANY NAME	COMPANY OWNER	ACCT. NO.
Ballinger Marketing Service	Ballinger, Stewart	0954
Dumas Independent Agency	Dumas, Tye	0965
Wylie Real Estate	Wylie, Jim	0987
West Maintenance	West, James	3472
Jeff Evans, Attorney	Evans, Jeff	3748
Jane Price, D.D.S.	Price, Jane	3894
Pumps, Inc.	Stimpson, Dan	3895
Joshua's Real Estate	Aaron, Joshua	6324
Henry's Interiors	Henry, Jennifer	6735
Thomas Johnson, M.D.	Johnson, Thomas M.D.	6754
Smith Medi Center	Smith, James T., MD	6785
James Cassidy, Attorney	Cassidy, James	6897
Waco Sport Club	Swanson, Sam	7643
Spenco Photography	Spenco, Tammy	7645
St. James Hospital	Stafford, Terry, Adm.	7654
Crammer Employment Agency	Crammer, Ted	7856
Baylor Student	James, Harold	8574
Student	Panque, Jamie	8643
James T. Baker, Attorney	Baker, James T.	8735
Hathaway Plumbing	Hathaway, Tim	8765
John's Print Shop	David, John	8765
Williams Interior Design	Williams, Marcy	8768
Don Stubing, Contractor	Stubing, Don	8907
Prinston Mfg.	Prinston, Ed	8964
Downing, Inc.	Downing, Cory	9843
Attaway Marketing Inc.	Attaway, Tom	9875
Turner Travel Agency	Turner, John P.	9876
*The Learning Center	Jones, Donald	9877
*Waco High School	Birdsong, Carol	9878

* New records

use client no

Report form c/no to print

dBase3 Client File--Sorted by Acct. No. in descending order
showing Company Name, Company Owner, and Acct. No.

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SECRETARIES INCORPORATED
LIST OF CLIENTS
ACCOUNT NUMBERS
CURRENT DATE

COMPANY NAME	COMPANY OWNER	ACCT. NO.
*Waco High School	Birdsong, Carol	9878
*The Learning Center	Jones, Donald	9877
Turner Travel Agency	Turner, John P.	9876
Attaway Marketing Inc.	Attaway, Tom	9875
Downing, Inc.	Downing, Cory	9843
Prinston Mfg.	Prinston, Ed	8964
Don Stubing, Contractor	Stubing, Don	8907
Williams Interior Design	Williams, Marcy	8768
John's Print Shop	David, John	8765
Hathaway Plumbing	Hathaway, Tim	8765
James T. Baker, Attorney	Baker, James T.	8735
Student	Panque, Jamie	8643
Baylor Student	James, Harold	8574
Crammer Employment Agency	Crammer, Ted	7856
St. James Hospital	Stafford, Terry, Adm.	7654
Spenco Photography	Spenco, Tammy	7645
Waco Sport Club	Swanson, Sam	7643
James Cassidy, Attorney	Cassidy, James	6897
Smith Medi Center	Smith, James T., MD	6785
Thomas Johnson, M.D.	Johnson, Thomas M.D.	6754
Henry's Interiors	Henry, Jennifer	6735
Joshua's Real Estate	Aaron, Joshua	6324
Pumps, Inc.	Stimpson, Dan	3895
Jane Price, D.D.S.	Price, Jane	3894
Jeff Evans, Attorney	Evans, Jeff	3748
West Maintenance	West, James	3472
Wyllie Real Estate	Wyllie, Jim	0987
Dumas Independent Agency	Dumas, Tye	0965
Ballinger Marketing Service	Ballinger, Stewart	0954

* new Records

use clnod

Report form clnod to print

Updating Company Files:

The students worked for two new clients; therefore, two bills should be created. These bills should reflect the balance due.

- * These keys will not show the number of hours and the balance because these amounts will vary with each student depending on the amount of time it takes to complete the jobs.

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Carol Birdsong
Address: 1201 Lake Air
City: Waco, TX 76710
Account No. 9878

DATE	DESCRIPTION	SOFTWARE	TYPE OF	NUMBER	CHARGES	PER HOUR	CHARGES	PAYMENTS	BALANCE
U2-Job 6	Grades	Lotus	*		10.00	0.00	0.00	0.00	
U2-Job 8	Grades-Rev.	Lotus			7.00	0.00			

*

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: The Learning Center
Address: 4102 Columbus Avenue
City: Waco, TX 76703
Account No. 9877

DATE	DESCRIPTION	SOFTWARE	TYPE OF	NUMBER	CHARGES	PER HOUR	CHARGES	PAYMENTS	BALANCE
U2-Job1	Data Base	dBase 3	*		9.00	0.00	0.00	0.00	
U2-Job3	Rv Data Based	Base 3			7.00	0.00			
U2-Job 4	Budget	Lotus			10.00	0.00			
U2-Job 7	Rev. Budget	Lotus			7.00	0.00			

*

Evaluation:

See Tests 2A and 2B and the keys for these tests beginning on the following page.

Name _____

Date _____

TEST 2A - DATA BASE

Advanced Information Processing

Create the following data base on the New York baseball starting line up. Use the following data to create the data base:

Name	Team	Position	Runs	RBI	Batting
Lid Sampson	New York	Pitcher	46	36	385.3
Jamie Taylor	" "	Catcher	23	14	240.5
Timothy Smith	" "	1 st Base	99	34	534.6
Bruce Johns	" "	2 nd Base	54	31	298.5
James Burgett	" "	Short Stop	47	25	387.6
Jeff Dodds	" "	Lt. Field	66	43	674.2
Ronald Williams	" "	C. Field	33	15	234.0
Jamie Jefferys	" "	Rt. Field	55	23	357.5
Steve Sealy	" "	3 rd Base	38	29	134.5

Instruction for Printing

1. List to print the file you just created.
2. Create a list showing the Runs in ascending order. The columns to be printed are name, team, position, and runs. Use report form to print this list.
3. Create list showing Runs in descending order. Use the same column headings as in No. 2.
4. Make the following changes in the file:

Delete the three lowest players according to Runs. Be sure to PACK the files

Add the following records:

James Utmore, New York, 3rd Base, 76, 27, 436.5
 Timothy Johns, New York, C. Field, 67, 29, 406.7
 Don Jester, New York, Rt. Field, 89, 40, 596.8

Use the commands, change and browse, to make the following changes:

NAME	TEAM	POSITIONS	RUNS	RBI	BATTING
Sampson, Ted	New York	Pitcher	46	36	385.3
Smith, Timothy	New York	1st Base	99	34	534.6
Johns, Bruce	New York	2nd Base	54	31	298.5
Burgett, James	New York	Short Stop	47	~~25~~ 31	387.6
Dodds, Jeff	New York	Lt. Field	66	43	674.2
Jefferies, Jamie	New York	Rt. Field	55	23	357.5
Utmore, James	New York	3rd Base	76	27	436.5
Johns, Timothy	New York	C. Field	~~67~~	29	~~406.7~~ 436.7
Jester, Don	New York	Rt. Field	89	40	596.8

5. Add a field to the original file for games played.
The following will go in that field:

Sampson	40
Smith	35
Johns	30
Burgett	25
Dodds	45
Jefferies	27
Utmore	21
Johns, T.	31
Jester	40

6. Create an alphabetized list by name showing all the fields in the file.

KEYS FOR
TEST 2A - DATA BASE

PART 1 - List to Print

Record#	NAME	TEAM	POSITIONS	RUNS	RBI	BATTING
1	Sampson, Ted	New York	Pitcher	46	36	385.3
2	Taylor, James	New York	Catcher	23	14	240.5
3	Smith, Timothy	New York	1st Base	99	34	534.6
4	Johns, Bruce	New York	2nd Base	54	31	298.5
5	Burgett, James	New York	Short Stop	47	25	387.6
6	Dodds, Jeff	New York	Lt. Field	66	43	674.2
7	Williams, Ronald	New York	C. Field	33	15	234.0
8	Jefferys, Jamie	New York	Rt. Field	55	23	357.5
9	Sealy, Steve	New York	3rd. Base	38	29	134.5

Use List 1

PART 2 - Sorted by runs in ascending order

Page No. 1
05/17/87

NEW YORK BASEBALL TEAM
LIST OF RUNS
CURRENT DATE

NAME OF PLAYERS	TEAM NAME	POSITION	RUNS
Taylor, James	New York	Catcher	23
Williams, Ronald	New York	C. Field	33
Sealy, Steve	New York	3rd. Base	38
Sampson, Ted	New York	Pitcher	46
Burgett, James	New York	Short Stop	47
Johns, Bruce	New York	2nd Base	54
Jefferys, Jamie	New York	Rt. Field	55
Dodds, Jeff	New York	Lt. Field	66
Smith, Timothy	New York	1st Base	99

use runs

Report form runs to print

Part 3 - Sorted by runs in descending order

Page No. 1

05/17/87

NEW YORK BASEBALL TEAM
LIST OF RUNS
CURRENT DATE

NAME OF PLAYERS	TEAM NAME	POSITION	RUNS
Smith, Timothy	New York	1st Base	99
Dodds, Jeff	New York	Lt. Field	66
Jefferys, Jamie	New York	Rt. Field	55
Johns, Bruce	New York	2nd Base	54
Burgett, James	New York	Short Stop	47
Sampson, Ted	New York	Pitcher	46
Sealy, Steve	New York	3rd. Base	38
Williams, Ronald	New York	C. Field	33
Taylor, James	New York	Catcher	23

Part 4 - List to Print

Record#	NAME	TEAM	POSITIONS	RUNS	RBI	BATTING
1	Sampson, Ted	New York	Pitcher	46	36	385.3
2	Smith, Timothy	New York	1st Base	99	34	534.6
3	Johns, Bruce	New York	2nd Base	54	31	298.5
4	Burgett, James	New York	Short Stop	47	21	387.6
5	Dodds, Jeff	New York	Lt. Field	66	43	674.2
6	Jefferies, Jamie	New York	Rt. Field	55	23	357.5
7	Utmore, James	New York	3rd Base	76	27	436.5
8	Johns, Timothy	New York	C. Field	76	29	436.7
9	Jester, Don	New York	Rt. Field	89	40	596.8

Use List 1

Part 5 - Alphabetized List sorted by Name

Page No. 1

05/17/87

NEW YORK BASEBALL TEAM
LIST OF ALL STATISTICS
CURRENT DATE

NAME OF PLAYERS	TEAM NAME	POSITION	RUNS	RBI	BAT AV.	GAMES
Burgett, James	New York	Short Stop	47	21	387.6	25
Dodds, Jeff	New York	Lt. Field	66	43	674.2	45
Jefferies, Jamie	New York	Rt. Field	55	23	357.5	27
Jester, Don	New York	Rt. Field	89	40	596.8	40
Johns, Bruce	New York	2nd Base	54	31	298.5	30
Johns, Timothy	New York	C. Field	76	29	436.7	31
Sampson, Ted	New York	Pitcher	46	36	385.3	40
Smith, Timothy	New York	1st Base	99	34	534.6	35
Utmore, James	New York	3rd Base	76	27	436.5	21

Name _____ Date _____

TEST 2B- LOTUS 1-2-3

JOB 1

1. Using Lotus 123 and your Lotus Data Disk, set up the following spreadsheet.
 - a. Put the name of the company and "Budget for 1987" centered at the top.
 - b. Leave a blank line between the main title of the spreadsheet and the column headings.
 - c. Center the column headings.
 - d. Put INCOME ITEMS and EXPENSE ITEMS in all caps.
 - e. Leave a blank line after TOTAL INCOME and TOTAL EXPENSES.

Enter the following information into the spreadsheet and print a copy of the spreadsheet.

XYZ Corporation		
Budget for 1987		
Budget Items	1986	1987
<u>INCOME ITEMS</u>		
Sales Income	30,987.00	35,798.00
Services Income	26,678.00	31,897.00
Total Income	?	?
<u>Expense Items</u>		
Salary Expense	30459.00	36,249.00
Building Rental	1548.00	1,601.00
Utilities	498.58	543.87
Miscellaneous	238.95	387.56
Total Expenses	?	?
Net Gain/Loss	?	?

2. Make the following changes in the spreadsheet and print.

XYZ CORPORATION
Budget for 1987

Budget Items	1986	1987
INCOME ITEMS		
Sales Income	30987.00	~~35798.00~~ 36,798.68
Services Income	26678.00	31897.00
TOTAL INCOME	57665.00	57665.00

EXPENSE ITEMS

Salary Expense	30459.00	36249.00
Building Rental	1548.00	1601.00
Utilities	498.58	543.87
Miscellaneous	~~238.95~~	~~387.56~~
TOTAL EXPENSES	32744.53	38781.43

NET GAIN/LOSS 24920.47 18883.57

Telephone Expense - \$256.87
Equipment 1,679.50

JOB 2

1. Set up the following spreadsheet for the Math Class.

- Center the column headings.
- Set decimal for one place.
- Leave a blank line between the column headings and the body of the spreadsheet
- Leave a blank line between the last enter of the spreadsheet and the averages.
- Average the two exercise grades and place that average in a separate column
- Average the two test grades and place that average in a separate column.
- The final grade will be arrived by multiplying .40 times the exercise average and by multiplying .60 times the test average and adding these answers together.

Enter the following information into the spreadsheet and print out a copy.

Waco High School
Math
Fall, 1987

<i>Name</i>	<i>Exer. 1</i>	<i>Exer. 2</i>	<i>Test 1</i>	<i>Test 2</i>
<i>Tom Smith</i>	<i>87</i>	<i>98</i>	<i>85</i>	<i>89</i>
<i>Cindy Stiers</i>	<i>65</i>	<i>76</i>	<i>77</i>	<i>87</i>
<i>Mat Srothens</i>	<i>87</i>	<i>98</i>	<i>86</i>	<i>90</i>
<i>Cammy Lipton</i>	<i>76</i>	<i>87</i>	<i>65</i>	<i>76</i>
<i>Jim White</i>	<i>98</i>	<i>87</i>	<i>76</i>	<i>93</i>

2. Sort the names and print out a copy.

TEST 2B- LOTUS 1-2-3

KEY

Job 1 - Part 1

XYZ CORPORATION Budget for 1987		
Budget Items	1986	1987
INCOME ITEMS		
Sales Income	30987.00	35798.00
Services Income	26678.00	31897.00
TOTAL INCOME	57665.00	57665.00
EXPENSE ITEMS		
Salary Expense	30459.00	36249.00
Building Rental	1548.00	1601.00
Utilities	498.58	543.87
Miscellaneous	238.95	387.56
TOTAL EXPENSES	32744.53	38781.43
NET GAIN/LOSS	24920.47	18883.57

Job 1 - Part 2

XYZ CORPORATION Budget for 1987		
Budget Items	1986	1987
INCOME ITEMS		
Sales Income	30987.00	36798.68
Services Income	26678.00	31897.00
TOTAL INCOME	57665.00	57665.00
EXPENSE ITEMS		
Salary Expense	30459.00	36249.00
Building Rental	1548.00	1601.00
Utilities	498.58	543.87
Telephone		256.87
Equipment		1679.5
TOTAL EXPENSES	32505.58	40330.24
NET GAIN/LOSS	25159.42	17334.76

Job 2 - Part 1

WACO HIGH SCHOOL
MATH
FALL, 1987

NAME	EXER. 1	EXER. 2	EXER. AVERAGE	TEST 1	TEST 2	TEST AVERAGE	FINAL GRADE
Smith, Tom	87.0	98.0	92.5	85.0	89.0	87.0	89.2
Stine, Cindy	65.0	76.0	70.5	77.0	87.0	82.0	77.4
Srothers, Mat	87.0	98.0	92.5	86.0	90.0	88.0	89.8
Tipton, Cammey	76.0	87.0	81.5	65.0	76.0	70.5	74.9
White, Jim	98.0	87.0	92.5	76.0	93.0	84.5	87.7
Averages	82.6	89.2	85.9	77.8	87.0	82.4	83.8

Job 2 - Part 2

WACO HIGH SCHOOL
MATH
FALL, 1987

NAME	EXER. 1	EXER. 2	EXER. AVERAGE	TEST 1	TEST 2	TEST AVERAGE	FINAL GRADE
Smith, Tom	87.0	98.0	92.5	85.0	89.0	87.0	89.2
Srothers, Mat	87.0	98.0	92.5	86.0	90.0	88.0	89.8
Stine, Cindy	65.0	76.0	70.5	77.0	87.0	82.0	77.4
Tipton, Cammey	76.0	87.0	81.5	65.0	76.0	70.5	74.9
White, Jim	98.0	87.0	92.5	76.0	93.0	84.5	87.7
Averages	82.6	89.2	85.9	77.8	87.0	82.4	83.8

UNIT 3
MEDICAL

OFT 2402: Advanced Information Processing

INSTRUCTOR'S GUIDE

Unit 3

Unit Title: Medical

Contents of Unit:

1. Read new information about medical documents
2. Create shells for medical documents
3. Create a History and Physical Report
4. Create an Operative Report
5. Create a Discharge Summary
6. Create a Short-Stay Report
7. Create a Radiology Report
8. Create a Pathology Report
9. Up-date client files in dBase3, client billing in Lotus 1-2-3, and calendar in Sidekick

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Append files and print reports using a database management system software package.
2. Edit spreadsheets and print reports using a spreadsheet software package.
3. Edit and print a calendar using a desktop management software package.
4. Use the Word Processor and calculator functions of a desktop management software package in order to produce documents.
5. Produce boilerplate documents using a word processing software package.
6. Produce mailable documents from handwritten documents and from dictation tapes in executive, medical, and legal fields using a word processing software package.
7. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
8. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Handouts for Unit 3

Software: DisplayWrite 4, dBase3, Lotus 1-2-3, and Sidekick.

Hardware: Microcomputer (640K) with two disk drives per student.

Procedures:

Reading materials on Medical
Keyboarding documents

Learning Activities:

Students are to follow instructions given in Student's Laboratory Guides to complete Jobs 1-9 in Unit 3.

Keys to Learning Activities:

On the following pages are the keys to the assigned jobs in Unit 3. All of the medical reports are done with a one-inch top margin and one-inch side margins.

In most medical institutions, paper costs are a big consideration. Therefore, as many lines as possible should be brought to the left margin. After a side heading is keyboarded, the next line is indented; but the subsequent lines are brought to the left margin.

HISTORY AND PHYSICAL REPORT

NAME:

HOSPITAL NO.:

ADMISSION DATE:

ATTENDING PHYSICIAN:

*use 1-inch
side margins*

CASE HISTORY

CHIEF COMPLAINT:

PRESENT ILLNESS:

PAST HISTORY:

ILLNESSES:

ALLERGIES:

MEDICATIONS:

OPERATIONS:

SOCIAL:

FAMILY HISTORY:

REVIEW OF SYSTEMS:

SKIN:

HEENT:

CR:

GI:

OB-GYN:

EXTREMITIES:

NEUROLOGIC:

PHYSICAL EXAMINATION

GENERAL:

VITAL SIGNS:

HEENT:

NECK:

CHEST:

Lungs:

Heart:

ABDOMEN:

PELVIC:

RECTAL:

EXTREMITIES:

NEUROLOGICAL:

IMPRESSION:

*use 1-inch side
margins*

lds

D:

T:

CONSULTATION REPORT

PATIENT NAME:

ATTENDING PHYSICIAN:

ROOM NO.:

DATE:

HOSPITAL NO.:

REASON FOR CONSULTATION:

PHYSICAL EXAMINATION:

DISCUSSION:

*use 1-inch
side margins*

I ds

D:

T:

OPERATIVE REPORT

PATIENT:

DATE:

HOSPITAL NO.:

ROOM NO.:

PREOPERATIVE DIAGNOSIS:

POSTOPERATIVE DIAGNOSIS:

ANESTHESIA:

OPERATION:

PROCEDURE:

SPONGE COUNT:

Surgeon _____

I ds

D:

T:

*use 1-inch
side margins*

DISCHARGE SUMMARY

PATIENT:

ATTENDING PHYSICIAN:

HOSPITAL NO.:

ROOM NO.:

ADMISSION DATE:

DISCHARGE DATE:

PRESENT ILLNESS:

PHYSICAL EXAMINATION:

HEENT:

LUNGS:

CARDIOVASCULAR:

ABDOMEN:

RADIOGRAPHICAL DATA:

LABORATORY DATA:

HOSPITAL COURSE:

FINAL DIAGNOSIS:

DISPOSITION:

*Use 1-inch
side margins*

I ds
D:
T:

SHORT-STAY REPORT

NAME:

HOSPITAL NO.:

ROOM NO.:

ADMISSION DATE:

ATTENDING PHYSICIAN:

HISTORY:

PAST HISTORY:

PHYSICAL EXAMINATION:

CHEST:

ABDOMEN:

EXTREMITIES:

NEUROLOGICAL:

IMPRESSION:

RECOMMENDATION:

*use 1-inch
side margins*

I ds

D:

T:

RADIOLOGY REPORT

NAME:

HOSPITAL NO:

ROOM NO.:

PROCEDURE:

RADIOLOGY NO.:

ATTENDING PHYSICIAN:

DATE:

PART BEING TREATED:

CLINICAL DIAGNOSIS:

CLINICAL HISTORY:

INTERPRETATION:

IMPRESSION:

*use 1-inch
side margins*

Radiologist M.D.

lds
D:
T:

PATHOLOGY REPORT

NAME:

HOSPITAL NO.:

ROOM NO:

PHYSICIAN:

DATE:

PATHOLOGY NO.:

SPECIMEN SUBMITTED:

GROSS DESCRIPTION:

MICROSCOPIC DESCRIPTION:

DIAGNOSIS:

*use 1-inch
side margins*

Pathologist M.D.

lds
D:
T:

HISTORY AND PHYSICAL REPORT

NAME: Mr. Ezra Dryden
HOSPITAL NO.: 213142
ROOM NO.: 391
ADMISSION DATE: 5-11-67
ATTENDING PHYSICIAN: Dr. A. F. Finley

*Use 1-inch
margin on
top, bottom
and sides*

CASE HISTORY

CHIEF COMPLAINT: "Fell off a ladder and hurt my back."

PRESENT ILLNESS: This 82-year-old white man has been in excellent health all his life. Three days ago while attempting to do some work around the house, he slipped and fell approximately two steps from a stepladder, landing on his back. At the time, he was seized with pain in the lumbosacral area and was unable to move. Since then his wife has cared for him at home with no relief of the pain; actually, it has increased in severity. He was brought to the ER yesterday and x-rays were taken which showed no abnormal findings. He was unable to move, unable to get out of bed, care for himself; and consequently, he was hospitalized.

PAST HISTORY: He had the usual childhood diseases. Has also had influenza but no other illnesses. No surgery.

SOCIAL HISTORY: Prior to his retirement, the patient worked as a carpenter. He neither drinks nor smokes.

FAMILY HISTORY: His father died at age 84 from pneumonia, and his mother died at age 80 from injuries sustained in a car accident. He has one sister who died at age 30 from diabetes.

REVIEW OF SYSTEMS:

CARDIOVASCULAR: Normal. No history of rheumatic fever, hypertension, or coronary heart diseases. There is no dyspnea, no ankle edema. He does not take any medications for his heart or blood pressure.

Continued . . .

Ezra Dryden

Page 2

History and Physical Report--5-11-87

RESPIRATORY: No history of pneumonia, pleurisy, or tuberculosis. No chronic cough and no hemoptysis.

GI: He has a good appetite; he maintains his weight well at approximately 180 lbs. There is no history of ulcers or jaundice, but he has had some abdominal discomfort the last two days. He has normal bowel movements, with the aid of Feenamint tablets every other day.

GENITOURINARY: He has nocturia (IX); no dysuria, pyuria, or hematuria. No history of renal colic.

NEUROMUSCULAR: No previous history of fractures or dislocations.

PHYSICAL EXAMINATION

GENERAL: This is a well-nourished, well-developed white man who appears considerably younger than his stated age of 82 years. He is mentally clear, is well oriented as to time and place, and is an excellent historian. He is resting quite comfortably, but he is complaining of pain in his lower back and also of some abdominal distress.

VITAL SIGNS: Temperature, 98.4; blood pressure, 180/94 mm Hg.; respiration rate, 16/min.; pulse rate, 90 beats per minute.

HEAD & NECK: Head - no tenderness; no masses palpable.

HEENT: Eyes--pupils round and equal, react to light and accommodations; sclerae clear.

Ears--Tympanic membranes not injected or inflamed; no discharge. Nose--normal nasal mucosa; no discharge. Mouth--no pathological findings. Neck--thyroid gland not palpable, no nodes palpable.

CHEST:

Lungs: Normal expansion. Lungs--clear and resonant to percussion and auscultation; no rales heard.

Heart: Rate is 92 and regular; no murmurs heard; no apparent heart enlargement.

Breasts: Normal male; no masses palpable.

Continued . . .

Ezra Dryden

Page 3

History and Physical Report--5-11-87

ABDOMEN: Considerably distended; liver, kidneys and spleen not palpated; no masses palpated, however, loops of bowel are felt through the abdominal wall; bowel sounds are practically absent and occasional tinkling is heard; no hernias.

RECTAL: Deferred at this time.

GENITALIA: Normal male.

EXTREMITIES: Symmetrical; normal reflexes; no edema

PROVISIONAL DIAGNOSIS: 1. Lumbosacral strain, rule out fracture of this area
2. Paralytic ileus
3. Generalized arteriosclerosis

lds

D: 6-23-87

T: 6-23-87

CONSULTATION REPORT

PATIENT NAME: John Smith
ATTENDING PHYSICIAN: Robert G. Sampson
ROOM NO.: 244
DATE: 6-27-87
HOSPITAL NO.: 876-321

*Use 1-inch
margins on top,
bottom and
sides*

REASON FOR CONSULTATION: This is a 62-year-old, white male referred to me in consultation by Doctor John Smyth and seen because of a lesion seen on barium enema examination.

For the past two months, the patient has noticed a change in his bowel habits, with increasing frequency of defecation, up to six times a day, softening of the consistency of his stool; and the appearance of mucus and blood mixed in with the stool. He also reports a sensation of incomplete evacuation of stool occasionally, but no tenesmus. In the past two months, he has complained of lower abdominal cramping pain, relieved by defecation. His appetite has been good, but he has lost twelve pounds during this interval. He has remained, however, quite active physically.

A barium enema examination was obtained by Doctor Smyth two weeks ago, and this showed a constricting lesion of the rectosigmoid. I have reviewed this x-ray, and this most certainly represents a carcinoma. A chest x-ray done today discloses a large density in the left lower lobe which is quite compatible with a lung metastasis. Liver scan performed today showed two large densities in the liver which, again, are most compatible with liver metastases. Alkaline phosphatase is 95, LDH 375, and the remainder of the SMA 12/60 panel is normal. Examination reveals blood pressure of 120/80, pulse 84, respirations 20, temperature 98.6.

PHYSICAL EXAMINATION: This is a well-developed, well-nourished, white male who appears in generally good condition and is rather vigorous for his age. There is no pallor or jaundice. Chest: clear to percussion and auscultation. Heart: Regular sinus rhythm. No murmurs audible.

Abdomen: There is a left upper paramedian scar (from some sort of hernia operation many years ago), a diagonal right lower quadrant scar (from an appendectomy), and bilateral groin scars

Continued . . .

John Smith
Page 2
Consultation Report--6-27-87

(from herniorrhaphies). The liver is one fingerbreadth below the right costal margin. The kidneys, spleen, and other masses are not palpable and no tenderness is elicited. Sigmoidoscopy: This was performed by Doctor Smyth with me present. The standard size Welch-Allyn sigmoidoscope can pass to 13 cm, and beyond this the bowel becomes too angulated and fixed for further introduction. A narrow sigmoidoscope could be advanced another 2 cm to 15 cm above the anal verge, and at this point, the distal border of a fungating lesion is seen which appears to be a carcinoma. Because only a narrow instrument could be inserted here, an adequate biopsy could not be obtained.

IMPRESSION: Carcinoma of the rectosigmoid with liver and lung metastases.

DISCUSSION: The question of whether surgery (an anterior resection) would benefit this patient can be resolved only by estimating his prognosis. Statistically, the patients with metastases of this sort live for an average of approximately six months, although one year ago eighteen months with this sort of spread is certainly not unheard of. Since he probably does not have very long to live with his tumor, the patient may very well succumb to his disseminated metastases before the tumor obstructs locally. For this reason, I would think that even a palliative resection of his rectosigmoid carcinoma would probably not be indicated at this time and in the event that a large bowel obstruction occurs, a palliative transverse colostomy can be done at that time. I would recommend that the patient be seen in consultation by a radiation therapist and a chemotherapist in the hopes that the local lesion could possibly be kept under control so that his local bowel symptoms would not cause an obstruction in the near future.

If I can be of any further service to you in this case, I shall be very happy to do so. Thank you very kindly for permitting me to see this very pleasant gentleman in consultation.

lds/smith.628
D: 6-27-87
T: 6-28-87

OPERATIVE REPORT

*use 1-inch
margins on
top, bottom
and sides*

PATIENT: Mrs. Velda Towner
DATE: 2-28-87
HOSPITAL NO.: 213147
ROOM NO.: Dr. G. F. Wiggand

PREOPERATIVE DIAGNOSIS: Coarctation of the Aorta

POSTOPERATIVE DIAGNOSIS: Coarctation of the Aorta

ANESTHESIA: General

OPERATION: Resection of coarctation of the aorta
and replacement with dacron graft.

FINDINGS: The patient had a typical postductal
coarctation of the descending aorta
with a fairly long narrow segment. The left common carotid
artery originated from the aortic arch quite close to the
subclavian artery.

PROCEDURE: Under general anesthesia the left
hemithorax was entered through a
posterolateral thoracotomy incision in the fourth intercostal
space. The lung was retracted anteriorly and the mediastinal
pleura overlying the descending aorta and left subclavian artery
was incised, and these vessels dissected free of the surrounding
structures. Cord tape was placed around the subclavian artery.
The aorta was dissected free. The vagus and recurrent nerves
were identified and retracted away from the aortic arch and a
cord tape placed around the arch just distal to the origin of the
common carotid and proximal to that of the subclavian. Following
this, the distal coarctated segment of the aorta was dissected
free from surrounding structures. A single intercostal artery
was divided and tied with No. 4-0 Tevdek, and a cord tape placed
across the aorta distally. A straight vascular clamp was placed
on the left subclavian artery and an atrial appendage clamp which
was placed on the aortic arch also included a portion of the
subclavian, but allowed the carotid to fill completely. An angle
coarctation clamp was placed on the aorta distally, and the
coarctated segment was then resected. A primary anastomosis was
not performed because it was determined that insufficient tissue

Continued . . .

Mrs. Velda Towner
Page 2
Operative Report--2-28-87

had been removed and the vessels were under too much tension. For this reason, a No. 18 dacron graft with a total length of about 1 3/4 inches was used to bridge the anastomosis, each end being sutured into place with a running suture of No. 4-0 Tevdek. The proximal anastomosis was performed first. After completion of the anastomoses, the distal clamp and then the proximal clamp was removed. The total period of time in which the aorta was clamped was 34 minutes. There were three small bleeding points in the anastomoses and each required a single suture of No. 4-0 Tevdek. After this, hemostasis was complete. The mediastinal pleura was then closed over the graft. A single chest tube was laid in the apex of the thoracic cavity and brought out through a stab wound inferior to the wound in the anterior axillary line. The chest wound was closed in the routine fashion using No. 2 Tevdek for the intercostal sutures, running No. 2-0 Tevdek on the muscular layers, running No. 4-0 Tevdek on the subcutaneous tissue, and running No. 3-0 nylon sutures on the skin.

The patient tolerated the procedure very well except for an episode of bigeminy and extrasystoles which occurred during the time the aorta was cross-clamped. These symptoms were treated with anti-arrhythmic drugs and the condition was stabilized.

Total blood loss was 800 cc.

The patient left the operating room in a good postoperative condition and was returned to the ward.

SPONGE COUNT: Reported correct.

Surgeon _____

lds/towner.228
D: 2-28-87
T: 2-28-87

DISCHARGE SUMMARY

PATIENT: Mrs. Leslie Konrad
ATTENDING PHYSICIAN: Dr. N. A. Miser
HOSPITAL NO.: 213151
ROOM NO.: 400
ADMISSION DATE: 9-29-87
DISCHARGE DATE: 10-7-87

*use 1-inch
margins on
top, bottom
and sides*

PRESENT ILLNESS: This is a 20-year-old woman, para one, gravida two, whose previous pregnancy ended five months ago with the delivery of a full-term infant. After the birth of her child she began taking oral contraceptives for birth control purposes. Because of the nausea which followed, the patient stopped taking the pills on August 14, 1987, but did not have a menstrual period until August 24, 1987. At that time she bled heavily for five days, using more than one box of pads per day. Around September 17, 1987, the patient developed right lower quadrant pain of increasing severity without significant radiation. At the time of her normal menstrual period, on September 24, 1987, the patient spotted for two days and then stopped. She came to the hospital because of an increase in the right lower quadrant pain. Past history revealed that the patient was hospitalized in 1967 for an episode of acute pelvic inflammatory disease.

PHYSICAL EXAMINATION: Examination showed the following findings: blood pressure, 120/78 mm Hg; pulse rate, 99 beats per minute; respiration rate, 20/min. Head, ears, eyes, nose, and throat were normal. The lungs were clear to auscultation and percussion. The heart revealed a slight tachycardia without murmurs. Examination of the abdomen revealed it to be soft with some right lower quadrant tenderness, but without rebound. Bowel sounds were normal. Pelvic examination revealed the uterus to be firm and normal in size. The right adnexa revealed a tender slightly mobile mass, measuring 3 x 5 cm in the cul-de-sac. The left adnexa was normal.

PROVISIONAL DIAGNOSIS: Suspected ectopic pregnancy.

LABORATORY EVALUATION: Studies disclosed the following values: hematocrit, 33% on admission (9-29-87); 31% on 10-1-87; 35.2% on 10-6-87; blood urea nitrogen, 4 mg/100cc; hemoglobin, 10.5 gm/100cc; white blood cell count 6,200; urinalysis, within normal limits; urine culture taken 9-29-87 revealed Klebsiella bacterial; repeat culture on 10-6-87

Continued . . .

Mrs. Leslie Konrad
Page 2
Discharge Summary--10-7-87

was negative; pap smear showed Class I reaction; serology, negative; pregnancy test, positive.

HOSPITAL COURSE: The patient was given intravenous fluids and surgical liquids. She continued to complain of right lower quadrant pain but remained afebrile. On October 1, 1987, pregnancy test results were positive. Because of the right adnexal mass, it was decided to observe the patient for another 24 hours and if the symptoms persisted to perform an exploratory laparotomy. On October 2, 1987, the patient continued to have abdominal pain and began complaining of dizzy spells. She was taken to the operating room and the laparotomy was performed. The postoperative course was uncomplicated and the patient was discharged in satisfactory condition on October 7, 1987.

RECOMMENDATIONS: Discharged with medication Furadantin, 100 mg four times daily, for ten days. She is to return to the clinic in approximately two weeks.

FINAL DIAGNOSIS: 1. Corpus luteum cyst of right ovary
2. Pregnancy

lds/konrad.108
D: 10-7-87
T: 10-8-87

HISTORY AND PHYSICAL REPORT

NAME: Jim A. Johnson
HOSPITAL NO.: 46-239
ADMISSION DATE: 9-3-67
ATTENDING PHYSICIAN: Donald Sharp, M.D.

*use 1-inch
margins on
top, bottom,
and sides*

CASE HISTORY

CHIEF COMPLAINT: Right Knee Pain.

HISTORY OF PRESENT ILLNESS: This 16-year-old male was running through the line during a football game today when he was tackled by several players. He fell, twisting his right knee. He tried to stand and the knee gave out. He hopped off the field. He was unable to walk on the leg and was brought to General Hospital. The patient denies previous injury to this knee.

PAST HISTORY:

ILLNESSES: Usual childhood diseases with sequelae.
Previous hospitalizations: Patient was hospitalized once as a child for work on his teeth. No other hospitalization or operations.

ALLERGIES: None

MEDICATIONS: None.

FAMILY HISTORY: No significant abnormalities.

REVIEW OF SYSTEMS: No significant abnormalities. Patient is in excellent health and in excellent physical condition.

PHYSICAL EXAMINATION

GENERAL: Physical Examination reveals a muscular, teenaged, white male in moderate distress with right knee pain. HEENT: Pupils are equal and react to

Continued . . .

Jim A. Johnson
Page 2
History & Physical--9-3-87

light. Sclerae are clear. Dentition is in good repair. There is no cervical tenderness or limitation of motion. Chest: Lungs clear to auscultation. No rib tenderness. Heart: Regular rate, no murmur. Abdomen: Soft and nontender, no masses, good bowel sounds. Right knee: Reveals medial joint line tenderness. There is slight tenderness over the adductor tubercle. There is no tibial tenderness. Anterior cruciate ligament appears to be intact. There is gross instability of the medial collateral ligament. There is no rotatory instability. Range of motion is 10 to 130 degrees on the right, 0 to 135 degrees on the left. There is no effusion in the right knee. Quadriceps mechanism is intact. There is no neurovascular problem of the right leg.

DIAGNOSIS:

Medial collateral ligament tear.
Probable medial meniscal tear.
Possible anterior cruciate ligament tear,
right knee

lds/johnson.94
D: 9-3-87
T: 9-4-87

SHORT-STAY REPORT

NAME: Carrie Johnson
HOSPITAL NO.: 39-6742
ROOM NO.: 4262
ADMISSION DATE: 7-28-67
ATTENDING PHYSICIAN: Tom Lucas, M.D.

*use 1-inch
margins on
top, bottom
and sides*

ADMISSION DIAGNOSIS: Status post-operative surgery, right elbow.

PRESENT ILLNESS: This 12-year-old male was admitted with a fracture dislocation of the right elbow which was reduced, closed, and then pinned with 4K wires to fix a displaced medial epicondyle. The patient did well and was discharged, and one week prior to this admission entered to have the cast removed. He is admitted at this time for elective removal of the K wires now seven weeks post open reduction/internal fixation.

HISTORY:

PAST HISTORY: See old chart.

The patient has known ALLERGIES TO ASPIRIN AND POSSIBLY TO PENICILLIN. He developed thrombocytopenia purpura at the age of five, possibly secondary to aspirin which he was taking at that time to control headache.

SOCIAL HISTORY: The patient lives with his parents and attends 7th grade. He has a brother and a sister.

FAMILY HISTORY: Unremarkable.

PHYSICAL EXAMINATION:

Vital signs: Blood pressure 116/70. Pulse 80 and regular Afebrile.

HEENT: Negative.

Chest: Clear to auscultation.

Cardiovascular: Normal sinus rhythm, no murmurs or gallops.

Continued . . .

Carrie Johnson
Page 2
History & Physical Report--7-28-87

Abdomen: Soft, nontender. No organomegaly.

Extremities: Soft gauze dressing over the right elbow which when removed reveals a draining sinus over the medial aspect of the elbow with gross purulence. No evidence of erythema or tenderness, however. Sinus is in the center of an otherwise healing surgical incision. The patient has flexion of the elbow to 120 degrees and extension limited to -40 degrees. Pronation and supination intact.

IMPRESSION: Infected right elbow wound, post open Reduction/internal fixation of the medial epicondyle.

lds/johnson.729

D: 7-28-87

T: 7-29-87

RADIOLOGY REPORT

NAME: Mrs. Melba Ming
HOSPITAL NO.: 213145
ROOM NO.: 394
ATTENDING PHYSICIAN: Dr. S. T. Oaks
X-RAY NO.: 694
DATE: 6-2-87

*use 1-inch
margins on
top, bottom
and sides*

INTERPRETATION: Barium enema examination reveals marked ulcerative areas and nodular to pseudopolypoid formations throughout the colon beginning in the region of the medsigmoid and becoming progressively more severe in the proximal portions. There is some limited distensibility in these areas and considerable irritability and spasticity which is most prominent in the cecum and ascending colon. There is reflex of barium into the terminal ileum which does not appear to be involved with any back-wash ileitis or changes that would raise the question of regional ileitis.

The rectum and distal portion of the sigmoid colon show no lack of distensibility and very little in the way of any ulcerations. However, this area as well as the remaining portions of the colon show extensive mucosal involvement on the postevacuation film.

These changes are strikingly increased over the relatively mild changes of small ulcerations seen on the barium enema examination of 1-12-87.

IMPRESSION: Findings, as described above, are considered to represent marked ulcerative colitis, progressively more severe in the proximal portion of the colon. The terminal ileum appears normal. The very remote possibility that these changes could be related to granulomatous colitis is extremely unlikely.

Radiologist M.D.

lds/ming.68
D: 6-2-87
T: 6-8-87

PATHOLOGY REPORT

NAME: Miss Heidi George
HOSPITAL NO.: 213150
ROOM NO: 399
PHYSICIAN: Dr. J. S. Jorden
DATE: 6-27-87
PATHOLOGY NO.: P-100
SPECIMEN SUBMITTED: Gallbladder

*use 1-inch
margins on
top, bottom
and sides*

GROSS DESCRIPTION: The previously opened gallbladder is about 10.5 cm long and about 2.5 cm in diameter. The mucosal surface is slightly coarse and exhibits fine yellow speckling. The wall is questionably slightly thickened. At the apex is a small nodular thickening of the gallbladder wall about 1.1 cm in diameter. From the mucosal aspect it presents a slight elevation with a slight central depression. The cut surfaces reveal a thickened nodular area about 0.6 cm thick and containing grossly visible, fine glandular or cystic spaces exuding a slight amount of mucoid material. Separately included are two calculi. The larger calculus is somewhat barrel shaped, measures 3 x 2 cm in diameter and is an amber color. It is hard, and it has a partly smooth and partly fine granular external surface. It cuts without difficulty to reveal a crystalline structure. The second smaller calculus has a configuration of a cone with two pancake facets on opposite ends. It measures 1.1 cm in diameter and 0.7 cm in length. It is a dark brownish yellow and externally is moderately smooth. Sections of the gallbladder are embedded.

MICROSCOPIC DESCRIPTION: The gallbladder shows blunting of the mucosal folds and focal mucous gland metaplasia. Small aggregates of foamy histiocytes are seen in the tips of some mucosal folds. The muscularis is markedly hypertrophied. There is little fibrosis. A moderate chronic inflammatory cell infiltration is present in the mucosa and focally in the muscularis. The nodule at the apex is composed of a proliferation of glandular spaces, some dilated deep within the wall of the gallbladder but largely external to the muscular layer. These glands are surrounded by a coarse pattern of proliferation of the smooth muscle.

Continued . . .

Miss Heidi George
Page 2
Pathology Report - 6-27-87

DIAGNOSIS:

1. Cholelithiasis
2. Chronic cholecystitis and
cholesterolosis of gallbladder
3. Adenomyosis of apex of gallbladder

Pathologist M.D.

lds/george.628
D: 6-27-87
T: 6-28-87

Updating Company Files:

The students dealt with only one client--Smith Medi Center. Therefore, the student should turn in a spreadsheet for the bill for this client.

Below is a key for the bill showing the unit and job number, the software used, and the charges per hour.

- * The amounts in the Number of Hours column and the Charges column are not shown because these amounts will vary because of the amount of time it takes the students to complete the jobs.

SECRETARIES INCORPORATED
3301 MAIN STREET
WACO, TX 76703

Name: Smith Medi Center
Address: 1234 Sun Valley
City: Waco, TX 76710
Account No. 6897

DATE	DESCRIPTION	SOFTWARE	TYPE OF	NUMBER	CHARGES			
				OF HOURS	PER HOUR	CHARGES	PAYMENTS	BALANCE
May 29 87	data base	dBase		2.75	9.00	24.75	0.00	24.75
U3-Job 1	Med. Shells	DW4		*	10.00	0.00		24.75
U3-Job 2	H&P	DW4			10.00	0.00		24.75
U3-Job 3	Consult	DW4			10.00	0.00		24.75
U3-Job 4	Opera	DW4			10.00	0.00		24.75
U3-Job 5	Dis Sum	DW4			10.00	0.00		24.75
U3-Job 6	ShortSta	DW4			10.00	0.00		24.75
U3-Job 7	ShortSTa	DW4			10.00	0.00		24.75
U3-Job 8	Rad Report	DW4			10.00	0.00		24.75
U3-Job 9	Path Report	DW4			10.00	0.00		24.75

X

X

Evaluation:

See Test 3 and the key beginning on the following page.

Evaluation:

See Test 3 and the key for this test beginning on the following page.

Name _____ Date _____

TEST 3 - UNIT 3

ADVANCED INFORMATION PROCESSING

Medical Reports

Job 1--Using the shell you created for a Short Stay Report, keyboard the following report. Print out a copy for your instructor.

Short-Stay Report

Name: James R. Roper

Hospital No: 5426

Room No: 226

Admission Date: Current date

Attending Physician: John R. Nelson, M.D.

History: Patient is a 6-year old male complaining of frequent episodes of tonsillitis. He has missed several weeks of school this spring because of infection.

Past History: There are no allergies. Bleeding history: None. Operations: none. Illnesses: None. Medications: Vitamins, iron. Has been on Penicillin for resolution of symptoms. Family History: Noncontributory.

Physical Exam: Skin: No rashes. EENT:
Ears: TM and canals appeared normal.
Nose: Congested posteriorly but not anteriorly. Throat: Very large cryptic

tonsils meeting in the midline. Neck: Numerous palpable nodes.

Chest: Lungs: Clear to percussion and auscultation. Heart: Not enlarged, normal sinus rhythm, no murmurs.

Abdomen: Soft, nontender

Extremities: Full range of motion.

Neurological: Completely normal.

Impression. Chronic hypertrophic tonsils and adenoids with recurrent infections.

Recommendation: Tonsillectomy and adenoidectomy.

John R. Nelson, M.D.

Job 2--Using the shell you created, keyboard the following Pathology Report and print out a copy.

Pathology Report

Name: Ruby J. Jones
 Hospital No.: 4968
 Room No.: 146
 Physician: Harold B. Booker, M.D.
 Date: Current Date
 Pathology No.: 3627
 Specimen Submitted: Tissue from left forearm

Gross Description: Specimen is an elliptical segment of cutaneous tissue which exhibits hemorrhage in the subcutaneous adipose tissue of recent origin. The specimen measures 10 x 7 x 5 mm. This is cylindrical shaped segment of gray, moderately firm material measuring 16 x 1 cm. This is sharp and consistent with a foreign body. The cutaneous and subcutaneous tissue is bisected and is totally embedded.

Microscopic Description: Examination reveals a well, demarcated demarcated dermal neoplasm. There are clear cells and squamous cells in this well-demarcated area and association with ductal structures resembling sweat gland ducts and containing some clear cells

Diagnosis: Tissue from left forearm:
Eccrine spiradenoma, benign.

Pathologist M. D.

SHORT-STAY REPORT

Key for
Test 3
Job 1

NAME: James R. Roper
HOSPITAL NO.: 5426
ROOM NO.: 226
ADMISSION DATE: Current Date
ATTENDING PHYSICIAN: John R. Nelson, M.D.

HISTORY: Patient is a 6-year old male complaining of frequent episodes of tonsillitis. He has missed several weeks of school this spring because of infections.

PAST HISTORY: There are no allergies. Bleeding history: None. Operations: None. Illnesses: None. Medications: Vitamins, iron. Has been on Penicillin for resolution of symptoms. Family History: Noncontributory.

PHYSICAL EXAMINATION: Skin: No rashes. EENT: Ears: TM and canals appeared normal. Nose: Congested posteriorly but not anteriorly. Throat: Very large cryptic tonsils meeting in the midline. Neck: Numerous palpable nodes.

CHEST: Lungs: Clear to percussion and auscultation. Heart: Not enlarged, normal sinus rhythm, no murmurs.

ABDOMEN: Soft, nontender

EXTREMITIES: Full range of motion.

NEUROLOGICAL: Completely normal.

IMPRESSION: Chronic hypertrophic tonsils and adenoids with recurrent infections.

RECOMMENDATION: Tonsillectomy and adenoidectomy.

John R. Nelson, M.D.

lds
D: 6-23-87
T: 6-23-87

PATHOLOGY REPORT

Key for
Test 3
Job 2

NAME: Ruby J. Jones
HOSPITAL NO.: 4968
ROOM NO: 146
PHYSICIAN: Harold B. Booker, M.D.
DATE: Current Date
PATHOLOGY NO.: 3627
SPECIMEN SUBMITTED: Tissue from left forearm

GROSS DESCRIPTION: Specimen is an elliptical segment of cutaneous tissue which exhibits hemorrhage in the subcutaneous adipose tissue of recent origin. The specimen measures 10 x 7 x 5 mm. There is cylindrical shaped segment of gray, moderately firm material measuring 6 x 1 cm. This is sharp and consistent with a foreign body. The cutaneous and subcutaneous tissue is bisected and is totally embedded.

MICROSCOPIC DESCRIPTION: Examination reveals a well, demarcated dermal neoplasm. There are clear cells and squamous cells in this well-demarcated area and association with ductal structures resembling sweat gland ducts and containing some clear cells.

DIAGNOSIS: Tissue from left forearm: Eccrine spiradenoma, benign.

Pathologist M.D.

lds
D: 6-23-87
T: 6-23-87

UNIT 4
MEDICAL FORMS

OFT 2402: Advanced Information Processing

INSTRUCTOR'S GUIDE

Unit 4

Unit Title: Medical Forms

Contents of Unit:

1. Create a Patient Registration Form
2. Create an Authorization for Release of Information
3. Create an Application for Employment
4. Create a form for Patient List
5. Preparing Patient Lists
6. Completing Insurance Forms
7. Up-date client files in dBase3, client billing in Lotus 1-2-3, and calendar in Sidekick

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Append files and print reports using a database management system software package.
2. Edit spreadsheets and print reports using a spreadsheet software package.
3. Edit and print a calendar using a desktop management software package.
4. Use the word processor and calculator functions of a desktop management software package in order to produce documents.
5. Produce boilerplate documents using a word processing software package.
6. Complete insurance forms and patient lists using a electric typewriter.
7. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
8. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Handouts for Unit 4

Software: DisplayWrite 4, dBase3, Lotus 1-2-3,
Sidekick.

Hardware: Microcomputer (640K) with two disk drives
per student.
Electric typewriter.

Procedures:

Simulation

Learning Activities:

Students are to follow instructions given in Student's
Laboratory Guide to complete Jobs 1-8 for Unit 4.

Keys to Learning Activities:

On the following pages are the keys to the assigned
jobs in Unit 4. The student's final copy of these jobs
may vary in format because they are asked to use their
judgment in setting up the jobs. On many jobs, the
vertical lines cannot be drawn on the computer;
therefore, the student will need to draw them after
printing.

The instructor will want to teach the students a method
of naming the documents. The instructor will also need
to decide whether the name of the document should show
in the document. Some of these keys show the name of
the of the document on the key.

ADVANCED INFORMATION PROCESSING

Instructor's Guide--Unit 4

PAGE 3

Unit 4 Job 1

PATIENT REGISTRATION FORM

PLEASE PRINT AND FILL OUT COMPLETELY

Unit 4 Job 1

Patient's Name _____ Date of Birth _____ Sex _____
Last FirstAddress _____
City State Zip Code

Telephone # _____ Social Security # _____

Marital Status: Single () Married () Divorced () Widowed () Separated ()

Bill to _____ Relationship to patient _____
Person responsible for paymentAddress _____
If different from patient's address City State Zip code

Employer _____ Occupation _____ How long _____

Employer's address _____ Telephone # _____

Name of spouse _____ Social Security # _____

Employer _____ Occupation _____ How long _____

Employer's address _____ Telephone # _____

Name of closest relative (other than spouse) _____

Address _____
City State Zip code

Telephone # _____ Relationship to patient _____

INSURANCE INFORMATION

Insured Person _____ Relationship to patient _____

Insurance Company _____ Address _____

City, State, Zip _____ Policy # _____ Group # _____

Medicare # _____ Medicaid # _____

I request that payment of authorized Medicare benefits be made either to me or on my behalf to James Smith, M.D. for any services furnished to me. I authorize any holder of medical or other information about me to release to the Health Care Financing Administration and its agents any information needed to determine these benefits for related services. I understand that I am responsible for any amount not covered by insurance. A photocopy of this authorization and assignment shall be considered as valid as the original and authorization is valid until revoked in writing.

In order to control our cost of billing, we request that payment be made at the time service is rendered. We would rather control our billing costs than be forced to raise our fees.

126

Responsible party's signature _____

Date _____

SMITH MEDI CENTER

AUTHORIZATION FOR RELEASE OF INFORMATION

Release _____ Release _____

From _____ To _____

Purpose of Release: _____

Description of Material to be Released:

Name of Illness: _____

Name of Injury: _____

Date of Hospitalization: _____

Records of Dr.: _____

Patient's Full Name: _____

Date of Birth: _____ Date Release Signed: _____

I consent to disclosure of information relating to my medical status, realizing this material may contain information that is protected by federal and state laws.

Patient's Signature: _____
(or Authorized Person)

lds/unit4.j2

APPLICATION FOR EMPLOYMENT

Name _____
Last First Middle Date _____

Address _____
Street City State ZIP

Phone No. _____ Social Security No. _____

In case of emergency, notify: _____

Position desired _____ Salary desired _____

Do you want full-time? _____ Part-time? _____ Temporary? _____ Summer only? _____

EDUCATION	Name and Address	Dates Attended		Date Graduated	Major Area of Study
		From	To		
Elementary					
High School					
College					
Other					

Go over this list carefully. Place an "x" beside every item in which you have had training or experience.

SKILLS

Typing Speed _____
Shorthand Speed _____
Dictaphone _____
Medical Terms _____
Phone _____
Book Appointments _____
Take Cash _____
Billing _____
Collections _____

MACHINES

Adding _____
Calculator _____
Keypunch _____
Mimeograph _____
Ditto _____
Cut Stencils _____

BOOKKEEPING

Posting _____
Peg Board _____
Payroll _____
Payroll Taxes _____
Accounts Receivable _____
Accounts Payable _____
Bank Deposits _____
Bank Reconc. _____
Close Books _____
Trial Balance _____
Statements _____

INSURANCE

Blue Shield _____
Blue Cross _____
Medicare _____
Medicaid _____
Others _____

EMPLOYMENT: List most recent employer first. Use extra sheet if necessary.

Name and Address of Employer	Dates Employed		Position	Reason for Leaving
	-From	To		

REFERENCES: Do not list relatives or former employers.

Name	Address	Telephone	How Long Known

Are you currently employed? _____ Date available for work _____

To the best of my knowledge, all of the foregoing information is true and given voluntarily.

I authorize Harborside Medical Clinic to contact my references, including previous employers, to confirm credentials.

Signature _____

TO BE COMPLETED BY INTERVIEWER

Interviewed by _____ Date interviewed _____

Remarks _____

Date employed _____ Position **129** _____

Salary _____

SMITH MED! CENTER
1234 SUN VALLEY
WACO, TX 76710

Date _____ Physician _____

BILLING STATEMENT

Please return this portion of your
remittance. Your canceled check is
your receipt.

\$ _____

DATE	DESCRIPTION	CHARGES	CREDIT	BALANCE

Pay last amount in Balance Column

lds/unit4.j4

SMITH MEDI CENTER
1234 SUN VALLEY
WACO, TX 76710

Patient List

<u>Hour</u>	<u>Patient</u>	<u>Procedure</u>	<u>Nature of illness</u>
-------------	----------------	------------------	--------------------------

Patient List

September 8, 1987

1ds/unit4. j5

☒ MEDICARE ☐ CHAMPUS ☐ BLUE SHIELD ☐ OTHER

READ INSTRUCTIONS BEFORE COMPLETING OR SIGNING THIS FORM

PATIENT & INSURED (SUBSCRIBER) INFORMATION				Form Approved OMB No. 09-380-01			
1. PATIENT'S NAME (Print name, complete address, last name)		2. PATIENT'S DATE OF BIRTH		3. INSURED'S NAME (If not insured, complete address, last name)			
Jim Goodman		12/04/23		Same			
4. PATIENT'S ADDRESS (Street, city, state, ZIP code)		5. PATIENT'S SEX		6. INSURED'S ID OR INSURANCE NO. (Last name only, if not insured)			
16 Ginger Road Newton, PA 18940-2440		MALE ☒ FEMALE ☐		190-43-6201 A			
TELEPHONE NUMBER		7. PATIENT'S RELATIONSHIP TO INSURED		8. INSURED'S GROUP NO. (If Group insured)			
		X					
9. OTHER HEALTH INSURANCE COVERAGE (Enter Name of Policyholder and Plan Name and Address and Policy or Insurance Agency Number)		10. WAS CONDITION RELATED TO		11. INSURED'S ADDRESS (Street, city, state, ZIP code)			
Pennsylvania Blue Shield 65		A. PATIENT'S EMPLOYMENT		Same			
		YES ☐ NO ☐					
		B. AN ACCIDENT					
		AUTO ☐ OTHER ☐					
12. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE (Print name below signature)				13. I AUTHORIZE PAYMENT OF MEDICAL BENEFITS TO UNDERSIGNED PHYSICIAN OR SUPPLIER FOR SERVICES DESCRIBED BELOW NOT APPLICABLE TO BLUE SHIELD			
Jim Goodman				SIGNED (Physician or Authorized Person)			
DATE							
PHYSICIAN OR SUPPLIER INFORMATION							
14. DATE OF		15. DATE FIRST CONSULTED YOU FOR THIS CONDITION		16. HAS PATIENT EVER HAD SAME OR SIMILAR SYMPTOM?		17A. IF AN EMERGENCY	
ILLNESS (FIRST SYMPTOM) OR INJURY (ACCIDENT) OR PREGNANCY (ILM)				YES ☐ NO ☐		CHECK HERE ☐	
18. DATE PATIENT ABLE TO RETURN TO WORK		19. DATES OF TOTAL DISABILITY		DATES OF PARTIAL DISABILITY			
		FROM TO		FROM TO			
20. NAME OF REFERRING PHYSICIAN OR OTHER SOURCE (If S. Smith, Smith, M.D.)				21. NAME & ADDRESS OF FACILITY WHERE SERVICES RENDERED (If other than home or office)			
22. NAME & ADDRESS OF FACILITY WHERE SERVICES RENDERED (If other than home or office)				23. HAS LABORATORY WORK BEEN DONE OUTSIDE YOUR OFFICE?			
				YES ☐ NO ☐ CHARGES			
24. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY (RELATE DIAGNOSIS TO PROCEDURE IN COLUMN 5 BY REFERENCE NUMBER 1, 2, 3, ETC OR DR CODE)				738			
451				FEE ☐ YES ☐ NO ☐			
				FAMILY PLANNING ☐ YES ☐ NO ☐			
				PRIOR AUTHORIZATION NO			
25. DATE OF SERVICE		26. PLACE OF SERVICE		27. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICE OR SUPPLY (Indicate CPT or ICD-9 code for each date given)		28. DIAGNOSIS CODE	
FROM	TO						
2/25/--		IH		90220 Hospital Visit, Initial comprehensive		1	60 00
2/26/--	3/3/--	IH		90240 Hospital visits, subsequent, brief		1	150 00
29. SIGNATURE OF PHYSICIAN OR SUPPLIER (If company that has responsibility for this service, sign name of company representative)				30. ACCEPT ASSIGNMENT (If on government contract, sign name of contractor)		31. TOTAL CHARGE	
				YES ☒ NO ☐		210 00	
32. YOUR SOCIAL SECURITY NO.				33. YOUR EMPLOYER'S NO.		34. BALANCE DUE	
						None	
35. YOUR PATIENT'S ACCOUNT NO.				36. YOUR TELEPHONE NO.		37. PHYSICIAN'S OR SUPPLIER'S NAME + ADDRESS (ZIP CODE & ID NO.)	
				917-757-2389		91 001 **EH 19257**	
James T. Smith, M.D. 1234 Sun Valley Waco, TX 76710							

HEALTH INSURANCE CLAIM FORM

☒ MEDICARE ☐ CHAMPUS ☐ BLUE SHIELD ☐ OTHER

(CHECK ONLY ONE)

READ INSTRUCTIONS BEFORE COMPLETING OR FILING THIS FORM

Form Approved OMB No. 09-38008

PATIENT & INSURED (SUBSCRIBER) INFORMATION			
1. PATIENT'S NAME (If not patient, insured name, last name) Jim Goodman		2. PATIENT'S DATE OF BIRTH 12 04 23	
3. PATIENT'S ADDRESS (Street, city, state, ZIP code) 16 Ginger Road Newton, TX 18940-2440		4. PATIENT'S SEX MALE ☒ FEMALE ☐	
5. PATIENT'S RELATIONSHIP TO INSURED SELF ☒ OTHER ☐		6. INSURED'S ID OR MEDICARE NO. (Contract and serial) 190-43-6201	
7. OTHER HEALTH INSURANCE COVERAGE (Enter Name of Policyholder and Plan Name and Address and Policy or Contract Number) Pennsylvania Blue Shield 65		8. INSURED'S GROUP NO. (If Group Member)	
9. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE (Print Name Below Signature) <i>Jim Goodman</i> DATE		10. WAS CONDITION RELATED TO: A. PATIENT'S EMPLOYMENT YES ☐ NO ☐ B. AN ACCIDENT AUTO ☐ OTHER ☐	
11. INSURED'S ADDRESS (Street, city, state, ZIP code) Same		12. AUTHORITY TO PAY (If not medical benefits to be provided, physician or supplier is not to be paid for services described below, NOT APPLICABLE TO BLUE SHIELD)	
13. PHYSICIAN OR SUPPLIER INFORMATION			
14. DATE OF SERVICE 3/6/--		15. DATE FIRST CONSULTED 12/04/23	
16. DATE PATIENT ABLE TO RETURN TO WORK		17. DATE OF TOTAL DISABILITY FROM 12/04/23 TO 03/06/24	
18. NAME OF REFERRING PHYSICIAN OR OTHER SOURCE (If S. 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 00)		19. HAS PATIENT BEEN HOSPITALIZED OR ADMITTED TO HOSPITAL IN LAST 12 MONTHS? YES ☐ NO ☐	
20. NAME & ADDRESS OF FACILITY WHERE SERVICES RENDERED (If other than name of office)		21. DATE OF ADMISSION 12/04/23	
22. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY (RELATE DIAGNOSIS TO PROCEDURE IN COLUMN 1 BY REFERENCE NUMBER 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 00)		23. HAS LABORATORY TESTS BEEN DONE OUTSIDE YOUR FACILITY? YES ☐ NO ☐	
24. DATE OF SERVICE 3/6/--		25. PLACE OF SERVICE 0	
26. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN Office Visit, Est. patient. intermediate		27. CHARGES 1 30 00	
28. DATE OF SERVICE 3/6/--		29. PLACE OF SERVICE 0	
30. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		31. CHARGES	
32. DATE OF SERVICE		33. PLACE OF SERVICE	
34. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		35. CHARGES	
36. DATE OF SERVICE		37. PLACE OF SERVICE	
38. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		39. CHARGES	
39. DATE OF SERVICE		40. PLACE OF SERVICE	
41. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		42. CHARGES	
43. DATE OF SERVICE		44. PLACE OF SERVICE	
45. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		46. CHARGES	
47. DATE OF SERVICE		48. PLACE OF SERVICE	
49. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		50. CHARGES	
51. DATE OF SERVICE		52. PLACE OF SERVICE	
53. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		54. CHARGES	
55. DATE OF SERVICE		56. PLACE OF SERVICE	
57. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		58. CHARGES	
59. DATE OF SERVICE		60. PLACE OF SERVICE	
61. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		62. CHARGES	
63. DATE OF SERVICE		64. PLACE OF SERVICE	
65. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		66. CHARGES	
67. DATE OF SERVICE		68. PLACE OF SERVICE	
69. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		70. CHARGES	
71. DATE OF SERVICE		72. PLACE OF SERVICE	
73. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		74. CHARGES	
75. DATE OF SERVICE		76. PLACE OF SERVICE	
77. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		78. CHARGES	
79. DATE OF SERVICE		80. PLACE OF SERVICE	
81. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		82. CHARGES	
83. DATE OF SERVICE		84. PLACE OF SERVICE	
85. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		86. CHARGES	
87. DATE OF SERVICE		88. PLACE OF SERVICE	
89. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		90. CHARGES	
91. DATE OF SERVICE		92. PLACE OF SERVICE	
93. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		94. CHARGES	
95. DATE OF SERVICE		96. PLACE OF SERVICE	
97. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		98. CHARGES	
99. DATE OF SERVICE		100. PLACE OF SERVICE	
101. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		102. CHARGES	
103. DATE OF SERVICE		104. PLACE OF SERVICE	
105. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		106. CHARGES	
107. DATE OF SERVICE		108. PLACE OF SERVICE	
109. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		110. CHARGES	
111. DATE OF SERVICE		112. PLACE OF SERVICE	
113. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		114. CHARGES	
115. DATE OF SERVICE		116. PLACE OF SERVICE	
117. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		118. CHARGES	
119. DATE OF SERVICE		120. PLACE OF SERVICE	
121. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		122. CHARGES	
123. DATE OF SERVICE		124. PLACE OF SERVICE	
125. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		126. CHARGES	
127. DATE OF SERVICE		128. PLACE OF SERVICE	
129. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		130. CHARGES	
131. DATE OF SERVICE		132. PLACE OF SERVICE	
133. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		134. CHARGES	
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137. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		138. CHARGES	
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141. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		142. CHARGES	
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145. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		146. CHARGES	
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149. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		150. CHARGES	
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153. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		154. CHARGES	
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157. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		158. CHARGES	
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161. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		162. CHARGES	
163. DATE OF SERVICE		164. PLACE OF SERVICE	
165. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		166. CHARGES	
167. DATE OF SERVICE		168. PLACE OF SERVICE	
169. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		170. CHARGES	
171. DATE OF SERVICE		172. PLACE OF SERVICE	
173. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		174. CHARGES	
175. DATE OF SERVICE		176. PLACE OF SERVICE	
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301. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		302. CHARGES	
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445. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		446. CHARGES	
447. DATE OF SERVICE		448. PLACE OF SERVICE	
449. FULLY DESCRIBE PROCEDURE, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN		450.	

☒ MEDICARE ☐ CHAMPUS ☐ BLUE SHIELD ☐ OTHER

READ INSTRUCTIONS BEFORE COMPLETING OR SIGNING THIS FORM

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Updating Company Files

The student dealt with only one client in this unit; therefore, they will have only one bill. Since there were no charges to the client list, they do not need to print out the report forms for dBase 3.

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Smith Medi Center
Address: 1234 Sun Valley
City: Waco, TX 76710
Account No. 6897

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 29 87	data base	dBase	2.75	9.00	24.75	0.00	24.75
U3-Job 1	Med. Shells	DW4		10.00	0.00		24.75
U3-Job 2	H&P	DW4		10.00	0.00		24.75
U3-Job 3	Consult	DW4		10.00	0.00		24.75
U3-Job 4	Opera	DW4		10.00	0.00		24.75
U3-Job 5	Dis Sum	DW4		10.00	0.00		24.75
U3-Job 6	ShortSta	DW4		10.00	0.00		24.75
U3-Job 7	ShortSTa	DW4		10.00	0.00		24.75
U3-Job 8	Rad Report	DW4		10.00	0.00		24.75
U3-Job 9	Path Report	DW4		10.00	0.00		24.75
U3-Job 10	Autopsy	DW4		10.00	0.00		24.75
U4-Job 1	Reg Form	DW4		10.00	0.00		24.75
U4-Job 2	Release	DW4		10.00	0.00		24.75
U4-Job 3	App	DW4		10.00	0.00		24.75
U4-Job 4	Billing	DW4		10.00	0.00		24.75
U4-Job 5	List	DW4		10.00	0.00		24.75
U4-Job 6	List	DW4		10.00	0.00		24.75
U4-Job 7	List	DW4		10.00	0.00		24.75
U4-Job 8	Insur	DW4		10.00	0.00		24.75

Evaluation:

See Test 4 and key beginning on the following page.

Name _____ Date _____

TEST 4 - UNIT 4
ADVANCED INFORMATION PROCESSING

Job 1 - Creating a form.

Create the following form. Use a 1 1/2-inch top margin and 1-inch side margins. Try to make the form look like the one sketched out below.

Personal Information

Name _____ Date _____
Address _____
Phone No _____ City State Z. code
Social Security No _____
Position desired _____
Salary Desired _____ Do you want full-time? _____

Education	Name and Address	Date attended		Date discharged	Mgo.
		From	To		
Elementary					
High School					
College					
Other					

I authorize Smith Medi Center to contact my references,
including previous employers, to confirm credentials.

Signature

Job 2--Filling Out Insurance Forms

Mrs. Amy Klipper was seen on March 24, 19__ for a consultation for Dr. Freeman. She was seen in the office (O). Please fill out her medicare form. Her diagnosis code is 451. This visit was not related to work and was not an accident. She did pay for the visit.

Procedure	Procedure Code*	Hypothetical Fee	Classification in Business Analysis Summaries Columns
Office visit, new patient, brief	90000	\$20	Office Visits
Office visit, new patient, intermediate	90015	30	Office Visits
Office visit, established patient, brief	90040	20	Office Visits
Office visit, established patient, intermediate	90060	30	Office Visits
Consultation	90605	50	Consultations
Hospital visits, initial, comprehensive	90220	60	Hospital Visits
Subsequent visits, brief	90240	\$25 per day	Hospital Visits
Complete blood count	85022	7	Laboratory
Blood sugar	82948	15	Laboratory
Sigmoidoscopy	45300	60	Diagnostic
Electrocardiogram	93000	55	Diagnostic

NOTE: A *new patient* is one being seen by the doctor for the first time; an *established patient* is one who has been seen previously.

All office examinations are *intermediate* unless otherwise indicated.

PLEASE PRINT AND FILL OUT COMPLETELY

Patient's Name Klipper Amy Date of Birth 2-6-80 Sex F
Last First
 Address 3127 Clever Lane Waco TX 76710
City State Zip Code
 Telephone # 817-772-8726 Social Security # 363-20 0097
 Marital Status: Single () Married (☒) Divorced () Widowed () Separated ()
 Bill to James I. Klipper Relationship to patient Husband
Person responsible for payment
 Address Same
If different from patient's address City State Zip code
 Employer Mak's Pet Shop Occupation Cashier How long 3
 Employer's address 2137 Main Street Telephone # 753-6249
 Name of spouse James I. Klipper Social Security # 216-09-3763
 Employer Central Freight Occupation Load Driver How long 30
 Employer's address 2761 Lake Air, Waco TX Telephone # 772-3691
 Name of closest relative (other than spouse) Bobby Dennis
 Address 3521 S. Kaye Waco TX 76710
City State Zip code
 Telephone # 817-2751-9126 Relationship to patient Uncle

INSURANCE INFORMATION

Insured Person James Klipper Relationship to patient Husband
 Insurance Company Prudential Address 10671 One Avenue
 City, State, Zip Dallas, TX 75219 Policy # 07260 Group # AR24
 Medicare # 0097621 Medicaid # _____

I request that payment of authorized Medicare benefits be made either to me or on my behalf to James Smith, M.D. for any services furnished to me. I authorize any holder of medical or other information about me to release to the Health Care Financing Administration and its agents any information needed to determine these benefits for related services. I understand that I am responsible for any amount not covered by insurance. A photocopy of this authorization and assignment shall be considered as valid as the original and authorization is valid until revoked in writing.

In order to control our cost of billing, we request that payment be made at the time service is rendered. We would rather control our billing costs than be forced to raise our fees.

James Klipper
 Responsible party's signature

7-24-84
 Date

☐ MEDICARE ☐ CHAMPUS ☐ BLUE SHIELD ☐ OTHER

READ INSTRUCTIONS BEFORE COMPLETING OR SIGNING THIS FORM

142

PERSONAL INFORMATION

Name _____ Date _____

Address _____
City State Zip Code

Phone No. _____ Social Security No. _____

Position Desired _____

Salary Desired _____ Do you want full-time? _____

Education	Name and Address	Dates From To	Graduated	Major
Elementary				
High School				
College				
Other				

I authorize Smith Medi Center to Contact my references, including previous employers, to confirm credentials.

Signature _____

HEALTH INSURANCE CLAIM FORM

☒ MEDICARE ☐ CHAMPUS ☐ BLUE SHIELD ☐ OTHER

Test 4
Job 2

(CHECK ONLY ONE)

READ INSTRUCTIONS BEFORE COMPLETING OR SIGNING THIS FORM

Form Approved OMB No. 09-3801A

PATIENT & INSURED (SUBSCRIBER) INFORMATION 1. PATIENT'S NAME (If not name, describe member, last name) <u>Amy Klipper</u>		2. PATIENT'S DATE OF BIRTH <u>2 6 20</u>		3. INSURED'S NAME (If not name, describe member, last name) <u>James T. Klipper</u>	
4. PATIENT'S ADDRESS (Street, city, state, ZIP code) <u>3627 Clower Lane</u> <u>Waco TX 76710</u>		5. PATIENT'S SEX MALE ☐ FEMALE ☒		6. INSURED'S ID OR MEDICARE NO. (Include any suffix) <u>0097621</u>	
7. PATIENT'S RELATIONSHIP TO INSURED SELF ☐ OTHER ☒		8. INSURED'S GROUP NO. (If Group Member) <u>AB24</u>		9. INSURED'S ADDRESS (Street, city, state, ZIP code) <u>Same</u>	
10. OTHER HEALTH INSURANCE COVERAGE (Type, name of Policyholder and Plan Name and Address and Policy or Member Identification Number) <u>Prudential</u> <u>10671 One Avenue</u> <u>Dallas, TX 72419</u>		11. WAS CONDITION RELATED TO A. PATIENT'S EMPLOYMENT YES ☐ NO ☒		12. AUTHORIZED BY MEMBER (If medical benefits to underwritten) Physician or claim is a first service described below NOT APPLICABLE TO BLUE SHIELD	
13. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE (If not name, describe member) I declare the contents of this health insurance card are true to the best of my knowledge and belief. <u>[Signature]</u>		14. DATE <u>[Date]</u>		15. AUTHORIZED BY MEMBER (If medical benefits to underwritten) Physician or claim is a first service described below NOT APPLICABLE TO BLUE SHIELD	
PHYSICIAN OR SUPPLIER INFORMATION					
16. DATE OF <u>[Date]</u>		17. DATE FIRST CONSULTED YOU FOR THIS CONDITION <u>[Date]</u>		18. WAS PATIENT WITH THIS CASE OR SIMILAR CONDITION? YES ☐ NO ☒	
19. DATE PATIENT ABLE TO RETURN TO WORK <u>[Date]</u>		20. DATES OF TOTAL DISABILITY FROM <u>[Date]</u> THROUGH <u>[Date]</u>		21. IF AN EMPLOYEE, CHECK HERE ☐	
22. NAME OF REFERRING PHYSICIAN OR OTHER SOURCE (If not, please attach agency) <u>[Name]</u>		23. NAME & ADDRESS OF FACILITY WHERE SERVICES RENDERED (If other than home or office) <u>[Address]</u>		24. DATES OF PARTIAL DISABILITY FROM <u>[Date]</u> THROUGH <u>[Date]</u>	
25. NAME & ADDRESS OF FACILITY WHERE SERVICES RENDERED (If other than home or office) <u>[Address]</u>		26. TIME REPORTS RELATED TO HOSPITALIZATION (If not hospitalization dates) ADMITTED <u>[Date]</u> DISCHARGED <u>[Date]</u>		27. WAS LABORATORY WORK PERFORMED OUTSIDE YOUR OFFICE? YES ☐ NO ☒	
28. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY (RELATE DIAGNOSIS TO PROCEDURE IN COLUMN 1) BY REFERENCE NUMBER 1, 2, 3, ETC. OR BY CODE <u>1 451</u>		29. CHARGES YES ☐ NO ☒		30. CHARGES YES ☐ NO ☒	
31. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		32. PLACE OF SERVICE YES ☐ NO ☒		33. CHARGES YES ☐ NO ☒	
34. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		35. PLACE OF SERVICE YES ☐ NO ☒		36. CHARGES YES ☐ NO ☒	
37. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		38. PLACE OF SERVICE YES ☐ NO ☒		39. CHARGES YES ☐ NO ☒	
40. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		41. PLACE OF SERVICE YES ☐ NO ☒		42. CHARGES YES ☐ NO ☒	
43. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		44. PLACE OF SERVICE YES ☐ NO ☒		45. CHARGES YES ☐ NO ☒	
46. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		47. PLACE OF SERVICE YES ☐ NO ☒		48. CHARGES YES ☐ NO ☒	
49. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		50. PLACE OF SERVICE YES ☐ NO ☒		51. CHARGES YES ☐ NO ☒	
52. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		53. PLACE OF SERVICE YES ☐ NO ☒		54. CHARGES YES ☐ NO ☒	
55. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		56. PLACE OF SERVICE YES ☐ NO ☒		57. CHARGES YES ☐ NO ☒	
58. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		59. PLACE OF SERVICE YES ☐ NO ☒		60. CHARGES YES ☐ NO ☒	
61. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		62. PLACE OF SERVICE YES ☐ NO ☒		63. CHARGES YES ☐ NO ☒	
64. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		65. PLACE OF SERVICE YES ☐ NO ☒		66. CHARGES YES ☐ NO ☒	
67. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		68. PLACE OF SERVICE YES ☐ NO ☒		69. CHARGES YES ☐ NO ☒	
70. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		71. PLACE OF SERVICE YES ☐ NO ☒		72. CHARGES YES ☐ NO ☒	
73. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		74. PLACE OF SERVICE YES ☐ NO ☒		75. CHARGES YES ☐ NO ☒	
76. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		77. PLACE OF SERVICE YES ☐ NO ☒		78. CHARGES YES ☐ NO ☒	
79. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		80. PLACE OF SERVICE YES ☐ NO ☒		81. CHARGES YES ☐ NO ☒	
82. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		83. PLACE OF SERVICE YES ☐ NO ☒		84. CHARGES YES ☐ NO ☒	
85. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		86. PLACE OF SERVICE YES ☐ NO ☒		87. CHARGES YES ☐ NO ☒	
88. DATE OF SERVICE FROM <u>3-24-87</u> TO <u>0</u>		89. PLACE OF SERVICE YES ☐ NO ☒		90. CHARGES YES ☐ NO ☒	
89. SIGNATURE OF PHYSICIAN OR SUPPLIER (If entity that the physician or the supplier entity is and not the patient's name) <u>[Signature]</u>		90. ACCEPT ASSIGNMENT IF GOVERNMENT CLAIMS ONLY YES ☐ NO ☒		91. TOTAL CHARGE <u>501.00</u>	
92. YOUR SOCIAL SECURITY NO. <u>[SSN]</u>		93. YOUR EMPLOYER'S NO. <u>[Employer No.]</u>		94. AMOUNT PAID <u>50.00</u>	
95. YOUR TELEPHONE NO. <u>817-757-2389</u>		96. PHYSICIAN'S OR SUPPLIER'S NAME <u>James T. Smith</u> <u>1234 Sun Valley</u> <u>Waco, TX 76710</u>		97. BALANCE DUE <u>00.00</u>	
98. YOUR PATIENT'S ACCOUNT NO. <u>[Account No.]</u>		99. DATE <u>[Date]</u>		100. PHYSICIAN'S OR SUPPLIER'S NAME <u>James T. Smith</u> <u>1234 Sun Valley</u> <u>Waco, TX 76710</u>	

UNIT 5

LEGAL

OFT 2402: Advanced Information Processing

INSTRUCTOR'S GUIDE

Unit 5

Unit Title: Legal

Contents of Unit:

1. Read material on legal documents
2. Create a shell for a legal heading
3. Create a Will
4. Create a Property Description
5. Create an Interrogatory
6. Up-date client files in dBase3, client billing in Lotus 1-2-3, and calendar in Sidekick

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Append files and print reports using a database management system software package.
2. Edit spreadsheets and print reports using a spreadsheet software package.
3. Produce mailable documents from handwritten documents in the legal field.
4. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
5. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Handouts for Unit 5

Legal backs

Software: DisplayWrite 4, dBase3, Lotus 1-2-3, Sidekick.

Hardware: Microcomputer (640K) with two disk drives per student.
Electric typewriter.

Procedures:

Simulation

Learning Activities:

Students are to follow instructions given in Student's Laboratory Guides to complete Jobs 1-5 in Unit 5.

Keys to Learning Activities:

Legal documents are presently undergoing many changes. Because of word processing equipment, the legal field has moved away from using a 1 1/2-inch left margin and a 1/2-inch right margin. They now use 1-inch side margins. The legal field is now using regular 8 1/2 x 11 inch paper.

The following keys are set up according to these new formats.

1 1/2" top margin
1" side margins

CASE NUMBER

- IN THE 74TH JUDICIAL
- DISTRICT COURT OF
- MCLENNAN COUNTY, TEXAS

.....

.....

10" space & indentation

2" top margin
1 inch side
margins

must have
a legal back

LAST WILL AND TESTAMENT OF
TAYLOR THOMPSON

I, TAYLOR THOMPSON, a resident of the City of
Gatesville, County of Gatesville, State of Texas, and residing at
2469 Willow Lane, being over the age of twenty-one years and of
sound and disposing mind and memory, and not acting under duress,
menace, fraud, or undue influence of any person whomsoever, do
make publish, and declare this my Last Will and Testament, in the
manner following, to wit:

I

I direct that all my debts, including my funeral
expenses, expense of my last illness, and expenses of the admin-
istration of my estate be paid by my executor, hereinafter named,
out of the first moneys coming into his hands and available
thereof.

II

I hereby declare that I am married; that my wife's name
is ALLENE THOMPSON; and that I have two children, a son JERROD F.
THOMPSON, and a daughter, BRANDIE THOMPSON.

III

I hereby give, devise, and bequeath to my son, JERROD
F. THOMPSON, my fourteen-karet gold pocket watch and the matching
fourteen-karet gold watch chain, both of which originally

*May carry one line
of a paragraph to the
next page*

1 1/2" top margin

belonged to my father, John Thompson.

IV

With the exception of the above-stated specific devise, I hereby give, devise, and bequeath all the rest residue of my property, after payment of the debts and expenses provided for in paragraph 1 hereof whether such property be real, personal, or mixed, or whatsoever kind of character and wheresoever situated, to my wife ALLENE.

V

I hereby nominate and appoint THE BANK OF GATESVILLE the executor of this, my Last Will and Testament, along with my wife, ALLENE, to serve as CO-EXECUTOR.

LASTLY, I hereby revoke all former wills and codicils to wills heretofore by me made.

IN WITNESS WHEREOF, I have hereunto set my hand and seal this 3rd day of May, 1987.

(Seal)

The foregoing instrument, consisting of three pages, was at the date, hereof, by TAYLOR THOMPSON, signed, sealed, and published and declared to be his Last Will and Testament, in the presence of us, who, at his request and in his presence and in

*Students will
need to change
this number*

1 1/2" top margin

the present of each other, have signed our names as witnesses
hereto.

_____ address _____

_____ address _____

_____ address _____

*1 1/2" top margin
1" side margins*

Unit 5
Job 3

EXHIBIT A

ALL that tract or parcel of land situated in Lot of Land Number Four Hundred and Thirty-Nine (439) particularly described as follows:

BEGINNING at the intersection of Texas Public Highway Number Three Hundred and Twenty-Four (324) with the East original Lot Number One Hundred and Seventy-Five (175):

THENCE North $42^{\circ}27'40''$ East, 809 feet to STARTING POINT;

THENCE East $32^{\circ}29'56''$ South, 437 feet;

THENCE South $42^{\circ}67'50''$ West, 345 feet;

THENCE West $32^{\circ}40'72''$ North, 809 feet to STARTING POINT:

BEING Lot Seven (7) of the re-subdivision of the Grant Subdivision according to Plot and Survey made by J. C. Harvey, Surveyors, on June 12, 19__, and recorded in the office of the Clerk of Superior Court, in Plot Book Three (3) of page thirty-four (34).

*1 1/2" top margin
1" side margins*

Unit 5
Job 4

CASE NUMBER

NATHAN SHARP * IN THE 74TH JUDICIAL
VS. * DISTRICT COURT OF
JONATHAN J. STEPHENS * MCLENNAN COUNTY, TEXAS

INTERROGATORIES TO PLAINTIFF

TO JONATHAN J. STEVENS, PLAINTIFF, AND TO HIS ATTORNEY OF RECORD

Pursuant to the Provisions of Federal Rules of Civil
Procedure, rule 23, to answer fully under oath the following
questions within 20 days.

1. Give your name, age, occupation, and address.
2. Specify your length of employment with Grant Mfg.
Co.
3. List the type positions you have held with the
above-mentioned company.
4. List any safety measures which have been suggested
to you for safety devices relating to your job.
5. Describe fully the safety precautions you had
followed on the day of the accident, June 14, 19__.
6. If you have used any of these safety devices,
please list and describe.
7. List any physicians who have treated you with
regard to this injury and give their addresses.

1 def major

8. Describe in detail the nature and extent of your injury.
9. State the number and date of hospitalizations and admissions to clients at this company.
10. List any dates you remained at home as a result of this injury.
11. List the total amount of earnings lost by your incapacity to work as a result of the injury.
12. Describe in detail the moneys you have spent as a result of the alleged negligence of the defendant.
13. List all the ways which you believe the defendant to have been negligent.
14. Describe in detail how the accident occurred and describe the machine you were operating at the time.
15. Describe fully your physician's prognosis concerning your injury.

James Baker, Attorney for Defendant

Updating Company Files

The student did work for only one client. Therefore, only one spreadsheet should be printed. No dBase reports should be printed because there were no changes in the client file.

Name: James T. Baker
Address: 2349 Danville
City: Waco, TX 76710
Account No. 8735

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
US-Job 1	Caption	DW4		10.00	0.00	0.00	0.00
US-Job 2	Will	DW4		10.00	0.00		0.00
US-Job 3	Land Des.	DW4		10.00	0.00		0.00
US-Job 4	Interrog	DW4		10.00	0.00		0.00

Evaluation:

See Test 5 and key beginning on the following page.

Name _____ Date _____

TEST 5 - LEGAL

Advanced Information Processing

Keyboard the following Will. Type (on the electronic typewriter) a legal back and attach the legal back to the Will.

Last Will and Testament
of Eusea^M Anderson

I, Eusea M. Anderson, being a single woman, residing in the City of Dallas, State of Texas, do make, publish and declare this instrument to be my Last Will and Testament, hereby revoking and canceling all former Wills and Codicils by me at any time made.

I

I direct that all of my just debts, including the expenses of my last illness and funeral, shall be paid out of my estate by my executor hereinafter named.

II

I give and bequeath my complete stamp collection and the sum of One Hundred Thousand Dollars (\$100,000) to my cousin, Colene Anderson, if living at the time of my death, otherwise to her husband and children equally.

2

III

I give and bequeath my house at 4628 Mariner Drive and the sum of One Hundred Thousand Dollars (\$100,000) to my nephew, James, if living at the time of my death, otherwise to his and children equally.

IV

All my other worldly goods, which I may own at the time of my death, and the residue of my estate, I give and bequeath to my brother, Jordan J. Anderson, if living at the time of my death, otherwise to his wife and children equally.

V

I direct my executrix to pay all estate and inheritance taxes, and succession duties assessed by the United States, any state thereof, or any foreign government, against my estate predicated upon my death as the taxable event.

VI

I hereby nominate, constitute, and appoint Benda J. Jeremy as executrix of my Last Will and Testament.

In Witness Whereof, I have hereunto subscribed my hand and seal to this my Last Will and Testament, at the City of Dallas this 23rd day of June, 19--.

Doris M. Anderson

We, the undersigned, do hereby certify that ~~Diceae~~ M. Anderson, the above-named Testator, on the day and year above written, signed the foregoing instrument in our presence, and published and declared the same to be her Last Will and Testament, and we, at the same time, at her request, in her presence, and in the presence of one another, have hereunto set our hands as subscribing witnesses; and we further certify that at such time she was of sound and disposing mind and memory.

_____ address _____

_____ address _____

_____ address _____

2" top margin
1" side margin

Unit 5
Test 5
KEY

must have
a legal Bank

LAST WILL AND TESTAMENT OF
DISERAE M. ANDERSON

I, DISERAE M. ANDERSON, being a single woman, residing in the City of Dallas, State of Texas, do make, publish and declare this instrument to be my Last Will and Testament, hereby revoking and canceling all former Wills and Codicils by me at any time made.

I

I direct that all of my just debts, including the expenses of my last illness and funeral, shall be paid out of my estate by my executrix hereinafter named.

II

I give and bequeath my complete stamp collection and the sum of One Hundred Thousand Dollars (\$100,000) to my cousin, COLENE ANDERSON, if then living at the time of my death, otherwise to her husband and children equally.

III

I give and bequeath my house at 4628 Mariner Drive and the sum of One Hundred Thousand Dollars (\$100,000) to my nephew, JAMES A. ANDERSON, if living at the time of my death, otherwise to his wife and children equally.

IV

All my other worldly goods, which I may own at the time of my death, and the residue of my estate, I give and bequeath to

1 1/2" top margin

my brother, JORDAN J. ANDERSON, if living at the time of my death, otherwise to his wife and children equally.

V

I direct my executrix to pay all estate and inheritance taxes, and succession duties assessed by the United States, any state thereof, or any foreign government, against my estate predicated upon my death as the taxable event.

VI

I hereby nominate, constitute, and appoint BRENDA J. JEREMY as executrix of my Last Will and Testament.

IN WITNESS WHEREOF, I have hereunto subscribed my hand and seal to this my Last Will and Testament, at the City of Dallas this 23rd day of June, 19--.

DISERAE M. ANDERSON

We, the undersigned, do hereby certify that DISERAE M. ANDERSON, the above-named testator, on the day and year above written, signed the foregoing instrument in our presence, and published and declared the same to be her Last Will and Testament, and we, at the same time, at her request, in her presence, and in the presence of one another, have hereunto set our hands as subscribing witnesses; and we further certify that as such time she was of sound and disposing mind and memory.

____ address _____
____ address _____
____ address _____

UNIT 6
MISCELLANEOUS DOCUMENTS

INSTRUCTOR'S GUIDE

Unit 6

Unit Title: Miscellaneous Documents

Contents of Unit:

1. Statistical Typing--on the Electric Typewriter
2. Statistical Typing--on the Electric Typewriter
3. Definitions--on the Electric Typewriter
4. Dictation--News Release announcing the new employee
5. Dictation--Paragraph alignment
6. Dictation--Tabulation
7. Boilerplate
8. Boilerplate
9. Merge letter
10. Itinerary
11. Dictation--News Release announcing the new Consultant
12. Compose a letter and merge with client list to clients, to inform them of new consultant aspect of the business
13. Up-date client files in dBase3, client billing in Lotus 1-2-3, and calendar in Sidekick

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Append files and print reports using a database management system software package.
2. Edit spreadsheets and print reports using a spreadsheet software package.
3. Edit and print a calendar using a desktop management software package.
4. Use the word processor and calculator functions of a desktop management software package in order to produce documents.
5. Produce boilerplate documents using a word processing software package.
6. Produce mailable documents from handwritten documents and from dictation tapes.
7. Compose a letter and print it out in mailable form.
8. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
9. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Handouts for Unit 6

Software: DisplayWrite 4, dBase3, Lotus 1-2-3,
Sidekick

Hardware: Microcomputer (640K) with two disk drives
per student.

Unit 6 Cassette Tape, Dictation/Transcription unit.

Procedures:

Simulation

Learning Activities:

Students are to follow instructions given in Student's
Laboratory Guides to complete Jobs 1-12 for Unit 6.

Keys to Learning Activities:

This unit uses advanced word processing functions. The student will create merge documents and boilerplate documents. The student will be transcribing documents in mailable form, as well as creating documents on the typewriter.

The instructor may want to teach the students how to name their documents. Also, many firms put the name of the document on the document for retrieval purposes.

COMPARISON OF COMPUTERS
Based on 1986 Survey of Businesses

Computer Brand	Peripheral Information							Expandable to 640 K
	Disk Drive		Screen		Keyboard		Programable Function Keys	
	1	2	Monochrome	Color	Querty	Dvorak		
DEC	yes	yes	yes	yes	yes	no	yes	yes
IBM	yes	yes	yes	yes	yes	no	yes	yes
Apple	yes	yes	yes	no	yes	yes	no	no
Phillips	yes	yes	yes	yes	yes	no	no	yes
Leading Edge	yes	yes	yes	yes	yes	no	yes	yes

PRICING INFORMATION FOR IRON PIPING *

2 X 20		2 X 21		2 X 23	
Catalog Number	Box of 5	Catalog Number	Box of 5	Catalog Number	Box of 5
056347	\$10.95	74236-21	\$12.95	4629-321	\$14.95
056348	\$10.95	74237-22	\$12.95	4630-322	\$14.95
056349	\$10.95	74238-23	\$12.95	4531-323	\$14.95
056350	\$10.95	74239-24	\$12.95	4632-324	\$14.95
056351	\$19.95	74140-25	\$12.95	4633-325	\$14.95

* Manufactured by General Corporation

OFFICE AUTOMATION QUESTIONS AND ANSWERS

*1-inch top
+ side margins*

1. Does every office need a typewriter?
No. An office does not need a typewriter if their work can be produced on a computer or word processor. However, if forms are used in the office, a typewriter is a must.
2. Can an office produce work efficiently with only one or two printers?
Yes. Since 75% to 80% of the production time of a document is spent in keyboarding, an office can operate quite efficiently by sharing printers.
3. Is it important to choose furniture carefully?
Certainly. Today furniture is being produced with the human body in mind. Look for ergonomically designed furniture that will fit the employee's body and the task to be performed.
4. Will reprographics save money for a company?
Yes. Duplicating documents for the office has become an important function. By purchasing or leasing copy machines, the company will save money in the long run.
5. What is the main purpose of micrographics?
Micrographics allow the company to cut down on storage space. One small box of microfiche can eliminate 5 to 7 filing cabinets. Also, the court system is now recognizing copies made from micrographics as admissible evidence.
6. Can facsimile and telecommunications speed document delivery?
Yes. A facsimile machine can now send documents in a matter of seconds. It can send typewritten documents as well as handwritten documents and graphics. Communicating computers can send information from one location to another in seconds. This information can either be printed or saved to disk or mainframe.

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

*1 1/2-inch
top margin*

NEWS RELEASE

RELEASE: IMMEDIATE

FROM: Susan Drake
Office Manager

WACO, TX (Current Date). Secretaries Incorporated would like to introduce (student's name) who joined our staff on (date for first day of class). She brings with her a suburb knowledge of data base, spreadsheet, and word processing. She will be available to our clients to help them with their client and employee files, budgets and other spreadsheet needs, correspondence and reports.

(Student Name) is a graduate of (name of your college) in the secretarial field. She has had courses in data base, spreadsheets, and word processing. With (Student's Name) help we will be able to serve your needs.

Call Secretaries Incorporated today for secretarial services at 3501 Main Street or for temporary secretarial services at your business.

*1-inch side
margins*

OFFICE AUTOMATION DEFINITIONS

1 1/2 inch top margin

Reprographics	The term applies to the process of reproducing or duplicating information, usually onto paper or microforms.
Micrographics	The term applies to reproducing of information in miniature for roll or cartridge film, microfilm, micropositives, and so on. Computer output microfilm (COM) is a process in which microfilm and microfiche are produced directly from computer output without intermediate hard copy and microfilming steps.
Phototypesetting	Information is put into type through the process of exposing characters on photosensitive material such as, photographic paper or film. When phototypesetters can accept information previously recorded by word processors, the need to rekeyboard is eliminated.
Voice Mail	The term applies to the storing of messages in digital form for convenient delivery at a later time. The transmitted voice is stored and then retrieved at a later time by a recipient who listens to the message rather than reading it on a screen or printout.
Electronic Mail	A system for delivering messages electronically to the recipient, who receives either a hard copy or a visually displayed message on a CRT screen. Electronic mail will at some point in our office evolution be less expensive than first-class mail. What electronic mail basically offers is the capability to get the right information to the right people on a timely basis.
Electronic Blackboard	This device has been set up in each meeting location so that any participating individual can write on it, and the writing will appear on a monitor (screen) in any number of other locations. This form of teleconferencing is inexpensive; it is also easy to install and can be accomplished over standard dial-up telephone lines.

Source: OFFICE AUTOMATION TECHNOLOGY AND CONCEPTS by Kathleen Wagoner and Mary Ruprecht

1 inch side + bottom margins

Facsimile	A system of telecommunications that scans an original image, converts it to an electrical signal, and then converts the electrical signal to a replica of the original image at the receiving terminal.
Communicating Word Processors	Combines text editing and high-quality output with communications capability. They can operate over most communication networks. A complete communicating word processing system can eliminate the need to send hard-copy letters by traditional mail since all messages are transmitted electronically and appear on video display terminals at their destination.
Computer Teleconferencing	Requires terminals and modems at each location. Simultaneous involvement of all participants is not needed. No prescheduling is necessary because a great deal of information can be transmitted and received at the convenience of both parties. Responses can be sent and received, again, at the convenience of the parties.
Teleconferencing	The electronic communication is a communication among three or more people at two or more separate locations. According to Thomas B. Cross of Cross Communications Company of Boulder, Colorado, 20 million meetings are held every day in the United States; 80 percent of all meetings last less than 30 minutes; 60 percent of all meetings could be handled by voice communications; and 35 percent of all meetings are for the exchange of information only. Many of these could be conducted via electronic communications. The three basic teleconference types are written, audio and video which can be used separately or in combination.
Audio Methods	Involves only the transmission of sound.
Video Methods	Involves pictures as well as sound; and they are transmitted by film, videotape, or "live" action.

1-inch top margin

FUTURE OFFICE EQUIPMENT

Sales Report

SALESPERSON	LAST YEAR		THIS YEAR	
	NUMBER	AMOUNT	NUMBER	AMOUNT
Sid Johnson	34	\$ 1,145,000	39	\$ 1,245,000
Pam Marrow	41	2,250,467	45	2,526,000
Tim Smith	40	2,405,767	60	3,521,079
Collin Jones	50	2,667,400	65	4,500,975
Gunther Beeson	32	1,445,000	47	2,894,899
Sharon Walker	49	1,798,479	56	3,798,400
James Taylor	75	6,794,079	80	7,894,400
Cindy White	44	3,107,076	52	3,479,899
Tom Collins	26	946,400	20	500,796
TOTAL	391	\$22,559,668	464	\$30,361,448

Job 7--Boilerplate

Consult INSTRUCTOR'S MANUAL WORD/INFORMATION PROCESSING: EXERCISES, APPLICATIONS, AND PROCEDURES by Arntson and Todesco on pp. 121-123.

Job 8--Boilerplate

Consult INSTRUCTOR'S MANUAL WORD/INFORMATION PROCESSING: EXERCISES, APPLICATIONS, AND PROCEDURES by Arntson and Todesco on pp. 124-126.

Job 9--Merge

Consult INSTRUCTOR'S MANUAL WORD/INFORMATION PROCESSING: EXERCISES, APPLICATIONS, AND PROCEDURES by Arntson and Todesco on pp. 134-136.

Job 10 - Itinerary

Consult INSTRUCTOR'S MANUAL WORD/INFORMATION PROCESSING: EXERCISES, APPLICATIONS, AND PROCEDURES by Arntson and Todesco on p. 78.

The title will be changed to "Itinerary."

The dates will be changed to the next Thursday and Friday according to when the student did this job--dates will vary.

Sep	26	1987
02:00p	Orientation & Assignments	
03:00p	Refreshments	
03:30p	Pres. of Strategic Plan	
04:00p	Pres. of Strategic Plan	
04:30p	Pres. of Strategic Plan	
05:00p	Discussion	
05:30p	Discussion	
06:30p	Cocktails and Dinner	

Sep	27	1987
08:00a	Breakfast-Alexander Hall	
09:00a	Analysis and Approval	
09:30a		
10:00a	of	
11:00a	Strategic	
11:30a	Plan	
12:00p	Lunch-Alexander Hall	
01:00p	Development	
01:30p	of	
02:00p	Implementation	
02:30p	Activities and	
03:00p	Follow-up Timelines	

SECRETARIES INCORPORATED
3101 MAIN STREET
WACO, TX 76703

*1 1/2-inch Top
margin*

NEWS RELEASE

RELEASE: IMMEDIATE

FROM: Susan Drake
Office Manager

WACO, TX (current date). Secretaries Incorporated is happy to announce a new consulting service. (Student name) has been promoted to Consultant, and (he/she) will be available to help your company up date with state of the art equipment.

(Student name) will come to your company for a tour of the office facilities and an indepth interview to determine the immediate needs and the future needs of your company. (Student name) has an expert knowledge of computer systems, LAN, and shared-computer systems. (She/He) can help you choose the correct printer or printers for your computer system. (She/He) can help you choose the correct copy machines, as well as intelligent copiers to meet your needs. Dictation equipment is a must for modern executives, and (she/he) can help you choose the equipment that is perfect for you and for your secretary.

Telecommunications is the must important area of office automation today. (Student name) can help you choose the best communicating devices for your office. Facsimile, telex, and communicating computers are a few of the telecommunication areas you will investigate. (Student name) will help you choose the equipment that will keep you in touch with the world.

1-inch side and bottom margins

News Release
Page 2
Current date

*1-inch top
and side margins*

Ergonomics is a new science which (student name) is very experienced. (She/He) will be able to help you choose desks, tables, and chairs that will keep your employees comfortable and happy. (She/He) will be able to help you create an open atmosphere in your office by choosing furniture and wall dividers that give privacy and an open feeling as well. (She/He) will help you choose colors and fabrics that will create a healthy work atmosphere for your employees.

Call Secretaries Incorporated to automate your office today.

*Shell of
the letter*

Current Date

!name!
!address!

Dear !name!

Plea

This is your opportunity, !name!, to totally automate !company!

so
call to schedule an appointment with me to discuss your
office automation needs.

I will be happy to come to your company to tour the office
facilities and to talk with you to determine the immediate
needs and the future needs of your company. During this
visit, we can determine your needs for a computer system, a
LAN, or a shared computer system. You may want to purchase
new printers that will print both graphics and text within
the same document. Copy machines are a must in most
businesses, and today there are many excellent brands to
handle your needs. Dictation equipment is saving time for
modern executives as well as their secretaries. There is
just the dictation equipment waiting for you. Let me help
you make these major decisions.

One of the fastest growing areas of office automation is
telecommunications. You will be able to transmit informa-
tion within seconds from your office to another office.
Think of the time this will save, not to mention the cost of
postage.

Your office will become a showplace for the future with
ergonomically designed desk, tables, and chairs. The design
of furniture has a direct impact on the productivity of your
employees. Your office areas can appear to be open as well
as private just by choosing the right furniture and wall
dividers. Ergonomics is well worth your time and your
money, so let me help you investigate it today.

*This pattern is a characteristic of
the software when doing a variable
merge*

!name!
Page 2
Current Date

*name in heading
should be a
variable*

I am available to tour your office, to investigate the many possibilities for equipment that will meet your needs and your budget, and to implement the choice we decide will benefit your company.

Call today! ! !

Sincerely

Student Name
Consultant

lds/consult.she

!name!Mr. Tom Attaway
!address!Attaway Marketing Inc.
9876 Bosque
Waco, TX 76710
!name!Mr. Attaway
!company!Attaway Marketing Inc.

*Full in for the
shell*

!name!Mr. Stewart Ballinger
!address!Ballinger Marketing Service
5973 Broughton
Waco, TX 76710
!name!Mr. Stewart
!company!Ballinger Marketing Service

*Fill-in for the
shell*

!name!Dr. James T. Smith
!address!Smith Medi Center
1234 Sun Valley
Waco, TX 76710
!name!Dr. Smith
!company!Smith Medi Center

*Fill-in for
the shell*

!name!Mr. Terry Stafford
!address!St. James Hospital
8954 Westview
Waco, TX 76710
!name!Mr. Stafford
!company!St. James Hospital

*Fill in for
the shell*

*Must be a 2-page letter.
Students letter will
vary from this key
since they are composing
the letter*

Current Date

Mr. Tom Attaway
Attaway Marketing Inc.
9876 Bosque
Waco, TX 76710

Dear Mr. Attaway

This is your opportunity, Mr. Attaway, to totally automate Attaway Marketing Inc. Please call to schedule an appointment with me to discuss your office automation needs.

I will be happy to come to your company to tour the office facilities and to talk with you to determine the immediate needs and the future needs of your company. During this visit, we can determine your needs for a computer system, a LAN, or a shared computer system. You may want to purchase new printers that will print both graphics and text within the same document. Copy machines are a must in most businesses, and today there are many excellent brands to handle your needs. Dictation equipment is saving time for modern executives as well as their secretaries. There is just the dictation equipment waiting for you. Let me help you make these major decisions.

One of the fastest growing areas of office automation is telecommunications. You will be able to transmit information within seconds from your office to another office. Think of the time this will save, not to mention the cost of postage.

Your office will become a showplace for the future with ergonomically designed desk, tables, and chairs. The design of furniture has a direct impact on the productivity of your employees. Your office areas can appear to be open as well as private just by choosing the right furniture and wall dividers. Ergonomics is well worth your time and your money, so let me help you investigate it today.

*1-inch
top margin*

Mr. Tom Attaway
Page 2
Current Date

I am available to tour your office, to investigate the many possibilities for equipment that will meet your needs and your budget, and to implement the choice we decide will benefit your company.

Call today! ! !

Sincerely

Student Name
Consultant

lds/consult.she

← name of document

Current Date

Mr. Stewart Ballinger
Ballinger Marketing Service
5973 Broughton
Waco, TX 76710

Dear Mr. Stewart

This is your opportunity, Mr. Stewart, to totally automate Ballinger Marketing Service. Please call to schedule an appointment with me to discuss your office automation needs.

I will be happy to come to your company to tour the office facilities and to talk with you to determine the immediate needs and the future needs of your company. During this visit, we can determine your needs for a computer system, a LAN, or a shared computer system. You may want to purchase new printers that will print both graphics and text within the same document. Copy machines are a must in most businesses, and today there are many excellent brands to handle your needs. Dictation equipment is saving time for modern executives as well as their secretaries. There is just the dictation equipment waiting for you. Let me help you make these major decisions.

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Mr. Stewart Ballinger
Page 2
Current Date

I am available to tour your office, to investigate the many possibilities for equipment that will meet your needs and your budget, and to implement the choice we decide will benefit your company.

Call today! ! !

Sincerely

Student Name
Consultant

lds/consult.she

Current Date

Dr. James T. Smith
Smith Medi Center
1234 Sun Valley
Waco, TX 76710

Dear Dr. Smith

This is your opportunity, Dr. Smith, to totally automate Smith Medi Center. Please call to schedule an appointment with me to discuss your office automation needs.

I will be happy to come to your company to tour the office facilities and to talk with you to determine the immediate needs and the future needs of your company. During this visit, we can determine your needs for a computer system, a LAN, or a shared computer system. You may want to purchase new printers that will print both graphics and text within the same document. Copy machines are a must in most businesses, and today there are many excellent brands to handle your needs. Dictation equipment is saving time for modern executives as well as their secretaries. There is just the dictation equipment waiting for you. Let me help you make these major decisions.

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Dr. James T. Smith
Page 2
Current Date

I am available to tour your office, to investigate the many possibilities for equipment that will meet your needs and your budget, and to implement the choice we decide will benefit your company.

Call today! ! !

Sincerely

Student Name
Consultant

lds/consult.she

Current Date

Mr. Terry Stafford
St. James Hospital
8954 Westview
Waco, TX 76710

Dear Mr. Stafford

This is your opportunity, Mr. Stafford, to totally automate St. James Hospital. Please call to schedule an appointment with me to discuss your office automation needs.

I will be happy to come to your company to tour the office facilities and to talk with you to determine the immediate needs and the future needs of your company. During this visit, we can determine your needs for a computer system, a LAN, or a shared computer system. You may want to purchase new printers that will print both graphics and text within the same document. Copy machines are a must in most businesses, and today there are many excellent brands to handle your needs. Dictation equipment is saving time for modern executives as well as their secretaries. There is just the dictation equipment waiting for you. Let me help you make these major decisions.

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Mr. Terry Stafford
Page 2
Current Date

I am available to tour your office, to investigate the many possibilities for equipment that will meet your needs and your budget, and to implement the choice we decide will benefit your company.

Call today! ! !

Sincerely

Student Name
Consultant

lds/consult.she

Updating Company Files

In this unit, the following clients asked for help from Secretaries Incorporated; Ballinger Marketing Service, John's Print Shop, Turner Travel Agency, and Smith Medi Center. The students should have printed bills for each of the clients.

There were no charges in the client file, therefore, no dBase reports need to be printed.

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Ballinger Marketing Service
Address: 5973 Broughton
City: Waco, TX 76710
Account No. 0954

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
U6-Job 1	Stat Table	DW4		10.00	0.00	0.00	0.00
U6-Job 2	Stat Table	DW4		10.00	0.00		0.00
U6-Job 3	Para Align	DW4		10.00	0.00		0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: John's Print Shop
Address: 4398 Main Street
City: Waco, TX 76708
Account No. 8765

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 12 87	Newsletter	DW4	3.00	10.00	30.00	0.00	30.00
MAY 18 87	Report	DW4	2.50	10.00	25.00		55.00
May 30 87					0.00	25.00	30.00
U6-Job 5	Para Align	DW4		10.00	0.00		30.00
U6-Job 6	Tabulation	DW4		10.00	0.00		30.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Turner Travel Agency
Address: 2349 Fort Street
City: Waco, TX 76710
Account No. 9876

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
U6-Job 7	Boilerplate	DW4		10.00	0.00	0.00	0.00
U6-Job 8	Boilerplate	DW4		10.00	0.00		0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Smith Medi Center
Address: 1234 Sun Valley
City: Waco, TX 76710
Account No. 6897

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 29 87	data base	dBase	2.75	9.00	24.75	0.00	24.75
U3-Job 1	Med. Shells	DW4		10.00	0.00		24.75
U3-Job 2	H&P	DW4		10.00	0.00		24.75
U3-Job 3	Consult	DW4		10.00	0.00		24.75
U3-Job 4	Opera	DW4		10.00	0.00		24.75
U3-Job 5	Dis Sum	DW4		10.00	0.00		24.75
U3-Job 6	ShortSta	DW4		10.00	0.00		24.75
U3-Job 7	ShortSta	DW4		10.00	0.00		24.75
U3-Job 8	Rad Report	DW4		10.00	0.00		24.75
U3-Job 9	Path Report	DW4		10.00	0.00		24.75
U3-Job 10	Autopsy	DW4		10.00	0.00		24.75
U4-Job 1	Reg Form	DW4		10.00	0.00		24.75
U4-Job 2	Release	DW4		10.00	0.00		24.75
U4-Job 3	App	DW4		10.00	0.00		24.75
U4-Job 4	Billing	DW4		10.00	0.00		24.75
U4-Job 5	List	DW4		10.00	0.00		24.75
U4-Job 6	List	DW4		10.00	0.00		24.75
U4-Job 7	List	DW4		10.00	0.00		24.75
U4-Job 8	Insur	DW4		10.00	0.00		24.75
U6-Job 9	Merge	DW4		10.00	0.00		24.75

Evaluation:

See Test 6 and key beginning on the following page.

Evaluation:

See Test 6 and key beginning on the following page.

Name _____

Date _____

TEST 6 - UNIT 6

ADVANCED INFORMATION PROCESSING

JOB 1 - MERGE

Keyboard the following shell letter inserting variables where indicated:

Shell Letter

Date

#1

Dear #2

Thank you, #3, for your contribution to our Convention. Your speech #4 was well received and very informative. The #5 Convention was a huge success.

I will be meeting with the planning committee for the next #6 convention on #7. We would like to put you on the agenda for next convention which is scheduled for #8.

As always, # 9, it is a pleasure
working with you.

Sincerely,

James J. Barker
Convention Supervisor

Print out a copy of the shell letter. After keyboarding the variable, print out a copy of that document.

The following are the variables to go into your fill in document:

Variables

Letter #1

#1 Mr. Joshua Jans
4236 Ames Blvd.
Dallas, TX 79214-3672

#2 Mr. Jans

#3 Mr. Jans

#4 "Office Automation"

#5 OAC

#6 OAC

#7 September 12, 19--

#8 March 23-26, 19--

#9 Mr. Jans

Letter # 2

- # 1 Mrs Beth Robinson
3627 Hillcrest
Houston, TX 77068-3219
- # 2 Mrs. Robinson
- # 3 Mrs. Robinson
- # 4 "Ergonomics"
- # 5 DPMA
- # 6 DPMA
- # 7 October 24, 19--
- # 8 April 27-30, 19--
- # 9 Mrs Robinson

JOB 2 - PARAGRAPH LIBRARY

Keyboard the following paragraphs into a library:

Paragraph

- (1) Thank you for your inquiry regarding our bank of speeches available to the public.
- (2) "Office Automation" is a speech that will inform you and your audience of the many a now being made in office equipment and in telecommunications
- (3) "Ergonomics" is a speech that will inform you and your audience of the science of ergonomics and how it can help employees to have more comfort in the computerized world.

- (4) The fee for "Office Automation" is \$10.50 plus \$1 postage charges.
- (5) The fee for "Ergonomics" is \$12.75 plus \$9.50 postage charges.
- (6) I hope this speech will be of some help.
- (7) Sincerely yours,
- (8) Sincerely,
- (9) Jim Stewart
Public Relations

Print out the paragraphs before going on.

Sent a letter to the following people using the indicated paragraphs in each letter:

Letter # 1 Mrs. Sara Montgomery
3726 James Street
Bradenton, FL 34207

Dear Mrs. Montgomery

1

3

5

6

7

9

Letter # 2

Mr. Jeremy White
#327 Whitney Lane
Waco, TX 76704

Dear Mr. White

1

2

4

6

8

9

Current Date

!address!

Dear !name!:

Thank you, !name!, for your contribution to our convention. Your speech entitled !speech! was well received and very informative. The !conname! convention was a huge success.

I will be meeting with the planning committee for the next !conname! convention on !meetdate!. We would like to put yo

the agenda for the next convention which is scheduled for !nextdate!.

As always, !name!, it is a pleasure working with you.

Sincerely,

James T. Booker
Convention Supervisor

lds/test6vl.key

Characteristic of this software

!address!MS BETH ROBINSON
3627 HILLCREST
HOUSTON TX 77068-3219
!name!Ms. Robinson
!speech!"Ergonomics"
!conname!DPMA
!meetdate!October 24, 1987
!nextdate!April 27-30, 1987

Test 6 Job 1

!address!MR JOSHUA JANS
4236 AMES BLVD
DALLAS TX 79214-3672
!name!Mr. Jans
!speech!"Office Automation"
!conname!OAC
!meetdate!September 12, 1987
!nextdate!March 23-26, 1987

Current Date

MR JOSHUA JANS
4236 AMES BLVD
DALLAS TX 79214-3672

Dear Mr. Jans:

Thank you, Mr. Jans, for your contribution to our convention. Your speech entitled "Office Automation" was well received and very informative. The OAC convention was a huge success.

I will be meeting with the planning committee for the next OAC convention on September 12, 1987. We would like to put you on the agenda for the next convention which is scheduled for March 23-26, 1987.

As always, Mr. Jans, it is a pleasure working with you.

.Sincerely,

James T. Booker
Convention Supervisor

lds/test6vl.key

Test 6 Job 1

MR JOSHUA JANS
4236 AMES BLVD
DALLAS TX 79214-3672

Current Date

Test 6 Job 1

MS BETH ROBINSON
3627 HILLCREST
HOUSTON TX 77068-3219

Dear Ms. Robinson:

Thank you, Ms. Robinson, for your contribution to our convention. Your speech entitled "Ergonomics" was well received and very informative. The DPMA convention was a huge success.

I will be meeting with the planning committee for the next DPMA convention on October 24, 1987. We would like to put you on the agenda for the next convention which is scheduled for April 27-30, 1987.

As always, Ms. Robinson, it is a pleasure working with you.

Sincerely,

James T. Booker
Convention Supervisor

lds/test6vl.key

Test 6 Job 1

MS BETH ROBINSON
3627 HILLCREST
HOUSTON TX 77068-3219

Thank you for your inquiry regarding our bank of speeches available to the public.

"Office Automation" is a speech that will inform you and your audience of the many advances now being made in office equipment and in telecommunications.

"Ergonomics" is a speech that will inform you and your audience of the science of ergonomics and how it can help employees to have more comfort in this computerized world.

The fee for "Office Automation" is \$10.50 plus \$1 for postage charges.

The fee for "Ergonomics" is \$12.75 plus \$1.50 for postage charges.

I hope this speech will be of some help.

Sincerely yours,

Sincerely,

Jim Stewart
Public Relations

Current Date

MRS SARA MONTGOMERY
3726 JAMES STREET
BRACKETSVILLE, TX 77267

Dear Ms. Montgomery:

Thank you for your inquiry regarding our bank of
speeches available to the public.

"Ergonomics" is a speech that will inform you and your
audience of the science of ergonomics and how it can
help employees to have more comfort in this computer-
ized world.

The fee for "Ergonomics" is \$12.75 plus \$1.50 for
postage charges.

I hope this speech will be of some help.

Sincerely yours,

Jim Stewart
Public Relations

lds/test6par.let

Current Date

MR JEREMY WHITE
4327 WHITNEY LANE
WACO, TX 76704

Dear Mr. White:

Thank you for your inquiry regarding our bank of speeches available to the public.

"Office Automation" is a speech that will inform you and your audience of the many advances now being made in office equipment and in telecommunications.

The fee for "Office Automation" is \$10.50 plus \$1 for postage charges.

I hope this speech will be of some help.

Sincerely,

Jim Stewart
Public Relations

lds/test6par.let

UNIT 7
LEARNING NEW SOFTWARE

OFT 2402 Advanced Information Processing

INSTRUCTOR'S GUIDE

Unit 7

Unit Title: Learning New Software

Contents of Unit:

1. Read the Manual to learn an unfamiliar word processing software package.
2. Create a report using the unfamiliar word processing software package.

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Demonstrate ability to use an unfamiliar word processing software package to produce a report.
2. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
3. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Handouts for Unit 7

Hardware: Microcomputer (640K) with two disk drives per student

Software: Word Perfect, Wordstar, or Multimate

Procedures:

Discussion
Demonstration

Learning Activities:

Read the documentation for the software to learn how to operate the software to create a report.

Key to Learning Activity:

Consult INSTRUCTOR'S MANUAL WORD/INFORMATION PROCESSING
on pages 83-84 for the key for this job.

Updating Company Files:

Secretaries Incorporated did work for Wylie Real
Estate; therefore, there will be a bill for this
client.

SECRETARIES INCORPORATED
3301 MAIN STREET
WACO, TX 76703

Name:	Wylie Real Estate
Address:	5940 West Avenue
City:	Waco, TX 76710
Account No.	0987

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 13 87		DW4	2.75	10.00	27.50	0.00	27.50
Unit 7	Report	Word Per		15.00	0.00		27.50

There were no changes in the client data base, so no
files need to be printed.

Evaluation:

Completion of report.

UNIT 8
DICTATION

OFT 2402 ADVANCED INFORMATION PROCESSING

INSTRUCTOR'S GUIDE

Unit 8

Unit Title: Dictation

Contents of Unit:

1. Complete the modules on guidelines for dictation.
2. Dictate an organized letter.

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Practice dictating and using dictation equipment.
2. Outline an organized letter for dictation.
3. Dictate an organized letter after working through a dictation unit.
4. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
5. Demonstrate the ability to manage time in order to complete assignments of the course in the amount of time given.

Equipment and Materials Required:

Student Laboratory Guide--Unit 8
Cassette recorder and microphone
Cassette tape

Procedures:

Discussion
Demonstration

Learning Activities:

Students are to follow instructions given in Student's Laboratory Guides to complete Job 1 in Unit 8.

Key to Learning Activity:

The following key for the worksheet is a suggested guide for Job 1. The students' worksheets and dictated letter will vary.

PLAN YOUR CORRESPONDENCE

*Suggestions for
Letter to be
dictated*

Step 1: Decide on the Key Ideas for the Letter

Who? *Lester Borker*
What? *Reject set alternative dates*
How? *Oct. 17 free, or suggest some other date*
When? *Oct 20 + 21 end; some date after November 1*
Where? *Will be in his town - St. Louis - November 15-16. Here*
End? *Oct. 17*
Come equipped with three ideas for program. Take
choice.

Step 2: Give Instructions for the Beginning of the Letter

*Transcriptionist - name, dept + acct no. 1 letter - medium length, put
on my stationery, 1 carbon copy. Please in today's mail.*

Step 3: Outline the Key Ideas

Paragraph 1 *Great to be working with you.*

Paragraph 2 *In Los Angeles Oct 20-21. Be free by noon
on Oct 17. or Will be in St. Louis Nov. 15-16.*

Paragraph 3

*Would be a good idea if each came with three
theme ideas*

Paragraph 4

Let's settle on date by Oct. 10.

Paragraph 5

Step 4: Instructions at the End of the Letter

please hold tape for 1 week
End of dictation

Evaluation:

Evaluate the tape made by the student using the evaluation sheet on the next page. Evaluation will include instructions, both before and after the letter, dictation skills, and organization of the letter.

EVALUATION CHECKLIST

Name _____ Grade _____

	<u>Poor</u>	<u>Fair</u>	<u>Average</u>	<u>Good</u>
1. Was an outline used?	_____	_____	_____	_____
2. Were beginning instructions complete?	_____	_____	_____	_____
3. Was the inside address complete?	_____	_____	_____	_____
4. Was correct salutation used?	_____	_____	_____	_____
5. Was the opening paragraph correctly written?	_____	_____	_____	_____
6. Were difficult and confusing words spelled using the phonetic alphabet?	_____	_____	_____	_____
7. Were punctuation marks dictated?	_____	_____	_____	_____
8. Were paragraphs dictated?	_____	_____	_____	_____
9. Was the closing paragraph correctly written?	_____	_____	_____	_____
10. Were the ending instructions complete?	_____	_____	_____	_____
11. Was the "You" attitude used?	_____	_____	_____	_____
12. Overall quality of letter	_____	_____	_____	_____
13. Overall quality of dictation	_____	_____	_____	_____

Suggested Improvements: _____

UNIT 9
PRINTING OUT DATA BASE MANAGEMENT
AND SPREADSHEET FILES

INSTRUCTOR'S GUIDE

Unit 9

Unit Title: Printing Out Database Management and Spreadsheet Files

Contents of Unit:

1. Print client and employee data bases.
2. Print Secretaries Incorporated's budget spreadsheet.
3. Print all bills.

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Append and edit database files
2. Print files using a database management software package.
3. Print report using a spreadsheet software package
4. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
5. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Student Laboratory Guide -- Unit 9
Hardware: Microcomputer (640K) with two disks per student
Software: dBase3, Lotus 1-2-3

Procedures:

Simulation

Learning Activities:

Students are to follow instructions given in Student's Laboratory Guides to complete jobs 1-4 in Unit 9.

Keys to Learning Activities:

The following pages contain the keys for the jobs in Unit 9. The students will first make the needed changes in the Employee file. Then they will print out all the final report forms for all dBase3 and Lotus 1-2-3 files as given in Unit 1.

dBase3 Employee File--Sorted by Name showing Last Name,
First Name, Initial, Department, and Extension

Page No. 1
05/26/87

SECRETARIES INCORPORATED
EMPLOYEE LIST
Extension List
Current Date

LAST NAME	FIRST NAME	INITIAL	DEPARTMENT	EXTENSION
Anderson	Anna	S.	Secretary	325
Darem	Janet	R.	Word Processing	235
Drake	Susan	D.	Management	364
Freeman	Linda	S.	Word Processing	341
*Grant	Janet		Word Processing	342
Johnson	Melba	J.	Secretary	238
Jones	Jim	J.	Accounting	342
Sampleton	Robert	D.	Secretary	324
Scott	Lance	J.	Public Relations	239
Simpson	Joyce	F.	Word Processing	237
Smith	Donna	C.	Word Processing	321
Smith	Jamie	C.	Word Processing	330
Spikes	Kathryn	V.	Word Processing	346
*Student	Susie	J.	Management	201
Timbers	John	T.	Accounting	340
Walker	Katy	S.	Word Processing	200

use sortname

Report from Entreport to print

dBase3 Employee File--Sorted by Department and Name showing
Last Name, First Name, Initial, Department, and Extension

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05/26/87

SECRETARIES INCORPORATED
EMPLOYEE LIST
Extension List
Current Date

LAST NAME	FIRST NAME	INITIAL	DEPARTMENT	EXTENSION
Jones	Jim	J.	Accounting	342
Timbers	John	T.	Accounting	340
Drake	Susan	D.	Management	364
*Student	Susie	J.	Management	201
Scott	Lance	J.	Public Relations	239
Anderson	Anna	S.	Secretary	325
Johnson	Melba	J.	Secretary	238
Sampleton	Robert	D.	Secretary	324
Darem	Janet	R.	Word Processing	235
Freeman	Linda	S.	Word Processing	341
*Grant	Janet		Word Processing	342
Simpson	Joyce	F.	Word Processing	237
Smith	Donna	C.	Word Processing	321
Smith	Jamie	C.	Word Processing	330
Spikes	Kathryn	V.	Word Processing	346
Walker	Katy	S.	Word Processing	200

use sort dept

Report from Extreport to print

dBase3 Employee File--Sorted by Employment Date in
descending order showing Last Name, First Name, Department,
and Employment

Page No. 1
05/26/87

SECRETARIES INCORPORATED
LIST OF EMPLOYEES
DATE OF EMPLOYMENT
CURRENT DATE

LAST NAME	FIRST NAME	DEPARTMENT	EMPLOYMENT
*Grant	Janet	Word Processing	05-26-87
Darem	Janet	Word Processing	03-02-87
Walker	Katy	Word Processing	01-14-87
*Student	Susie	Management	01-13-87
Sampleton	Robert	Secretary	12-03-86
Anderson	Anna	Secretary	12-03-86
Simpson	Joyce	Word Processing	11-04-86
Timbers	John	Accounting	02-17-86
Smith	Donna	Word Processing	02-04-86
Johnson	Melba	Secretary	09-23-85
Jones	Jim	Accounting	03-24-85
Smith	Jamie	Word Processing	03-20-85
Freeman	Linda	Word Processing	03-14-85
Scott	Lance	Public Relations	01-23-85
Spikes	Kathryn	Word Processing	02-02-84
Drake	Susan	Management	03-08-83

*use emulated
Report form date to print*

dBase3 Employee File--Sorted by Employment Date in ascending order showing Last Name, First Name, Department, and Employment

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05/26/87

SECRETARIES INCORPORATED
LIST OF EMPLOYEES
DATE OF EMPLOYMENT
CURRENT DATE

LAST NAME	FIRST NAME	DEPARTMENT	EMPLOYMENT
Drake	Susan	Management	03-08-83
Spikes	Kathryn	Word Processing	02-02-84
Scott	Lance	Public Relations	01-23-85
Freeman	Linda	Word Processing	03-14-85
Smith	Jamie	Word Processing	03-20-85
Jones	Jim	Accounting	03-24-85
Johnson	Melba	Secretary	09-23-85
Smith	Donna	Word Processing	02-04-86
Timbers	John	Accounting	02-17-86
Simpson	Joyce	Word Processing	11-04-86
Anderson	Anna	Secretary	12-03-86
Sampleton	Robert	Secretary	12-03-86
*Student	Susie	Management	01-13-87
Walker	Katy	Word Processing	01-14-87
Darem	Janet	Word Processing	03-02-87
*Grant	Janet	Word Processing	05-26-87

use empdates

Report form date to print

dBase3 Employee File--Sorted by Name showing Last Name,
First Name, Address, City, State, and ZIP

Page No. 1
05/26/87

SECRETARIES INCORPORATED
LIST OF EMPLOYEES
HOME ADDRESSES
CURRENT DATE

LAST NAME	FIRST NAME	ADDRESS	CITY	STATE	ZIP
Anderson	Anna	253 Belview Drive	Waco	TX	76710
Darem	Janet	876 Stronge Street	Waco	TX	76710
Drake	Susan	234 Smith	Waco	TX	79710
Freeman	Linda	1234 Crest Street	Waco	TX	76710
*Grant	Janet	4573 Dear Point	Waco	TX	76720
Johnson	Melba	2309 Patricia	Waco	TX	76709
Jones	Jim	1425 Fish Pond	Waco	TX	76710
Sampleton	Robert	345 Times Street	Waco	TX	76707
Scott	Lance	9476 Beth	Waco	TX	76707
Simpson	Joyce	4857 Brenda Street	Waco	TX	76703
Smith	Donna	2356 Town Street	Waco	TX	76710
Smith	Jamie	8764 Embers	Waco	TX	76706
Spikes	Kathryn	4508 Lake Air	Waco	TX	76710
*Student	Susie	3421 Dream Street	Waco	TX	76710
Timbers	John	435 Meyers Lane	Waco	TX	76708
Walker	Katy	2525 Linda Lane	Waco	TX	76710

use sortname

Report from namesaddr

dBase3 Employee File--Sorted by Name showing Last Name,
First Name, Department, and SS#.

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SECRETARIES INCORPORATED
LIST OF EMPLOYEES
SOCIAL SECURITY NUMBER
CURRENT DATE

LAST NAME	FIRST NAME	DEPARTMENT	SS#
Anderson	Anna	Secretary	345-68-2037
Darem	Janet	Word Processing	987-23-5403
Drake	Susan	Management	483-87-8976
Freeman	Linda	Word Processing	239-98-7354
*Grant	Janet	Word Processing	435-90-6489
Johnson	Melba	Secretary	098-34-8467
Jones	Jim	Accounting	235-32-8765
Sampleton	Robert	Secretary	345-68-2037
Scott	Lance	Public Relations	789-23-6784
Simpson	Joyce	Word Processing	283-63-0974
Smith	Donna	Word Processing	456-98-9764
Smith	Jamie	Word Processing	786-04-8745
Spikes	Kathryn	Word Processing	098-38-7543
*Student	Susie	Management	345-89-4567
Timbers	John	Accounting	234-98-6879
Walker	Katy	Word Processing	549-98-3487

Use sortname

Report Form names to print

dBase3 Employee File--Sorted by Name showing Last Name,
First Name, and Telephone Number.

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SECRETARIES INCORPORATED
LIST OF EMPLOYEES
TELEPHONE NUMBERS
CURRENT DATE

LAST NAME	FIRST NAME	TELEPHONE NUMBER
Anderson	Anna	776-9875
Darem	Janet	772-0964
Drake	Susan	752-3344
Freeman	Linda	772-3497
*Grant	Janet	753-2390
Johnson	Melba	751-0936
Jones	Jim	776-3297
Sampleton	Robert	666-3409
Scott	Lance	751-0937
Simpson	Joyce	776-0639
Smith	Donna	753-4499
Smith	Jamie	756-2093
Spikes	Kathryn	772-3048
*Student	Susie	772-0964
Timbers	John	666-3048
Walker	Katy	662-9865

*use sortname
report form tab to print*

dBase3 Employee File--Sorted by Network showing Last Name,
First Name, Department, Extension, and Network.

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SECRETARIES CORPORATED
LIST OF EMPLOYEES
NETWORK ACCESS LIST
CURRENT DATE

LAST NAME	FIRST NAME	DEPARTMENT	EXTENSION	NETWORK
Anderson	Anna	Secretary	325	No
Sampleton	Robert	Secretary	324	No
Scott	Lance	Public Relations	239	No
Darem	Janet	Word Processing	235	Yes
Drake	Susan	Management	364	Yes
Freeman	Linda	Word Processing	341	Yes
*Grant	Janet	Word Processing	342	Yes
Johnson	Melba	Secretary	238	Yes
Jones	Jim	Accounting	342	Yes
Simpson	Joyce	Word Processing	237	Yes
Smith	Donna	Word Processing	321	Yes
Smith	Jamie	Word Processing	330	Yes
Spikes	Kathryn	Word Processing	346	Yes
*Student	Susie	Management	201	Yes
Timbers	John	Accounting	340	Yes
Walker	Katy	Word Processing	200	Yes

use network

Report form net to print

dBase3 Employee File--Sorted by Name showing Last Name,
First Name, Address, City, State, ZIP Code, and Telephone
Number.

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05/26/87

SECRETARIES INCORPORATED
LIST OF EMPLOYEES
ADDRESSES AND TELEPHONE NUMBERS
CURRENT DATE

LAST NAME	FIRST NAME	ADDRESS	CITY	STATE	ZIP CODE	TELE NUMBER
Anderson	Anna	253 Belview Drive	Waco	TX	76710	776-9875
Darem	Janet	876 Stronge Street	Waco	TX	76710	772-0964
Drake	Susan	234 Smith	Waco	TX	79710	752-3344
Freeman	Linda	1234 Crest Street	Waco	TX	76710	772-3497
Grant	Janet	4573 Dear Point	Waco	TX	76720	753-2390
Johnson	Melba	2309 Patricia	Waco	TX	76709	751-0936
Jones	Jim	1425 Fish Pond	Waco	TX	76710	776-3297
Sampleton	Robert	345 Times Street	Waco	TX	76707	666-3409
Scott	Lance	9476 Beth	Waco	TX	76707	751-0937
Simpson	Joyce	4857 Brenda Street	Waco	TX	76703	776-0639
Smith	Donna	2356 Town Street	Waco	TX	76710	753-4499
Smith	Jamie	8764 Embers	Waco	TX	76706	756-2093
Spikes	Kathryn	4508 Lake Air	Waco	TX	76710	772-3048
Student	Susie	3421 Dream Street	Waco	TX	76710	772-0964
Timbers	John	435 Meyers Lane	Waco	TX	76708	666-3048
Walker	Katy	2525 Linda Lane	Waco	TX	76710	662-9865

use software

Report from add file to print

dBase3 Client File--Sorted by Company Name Showing Company
Name, Address, City, State, and ZIP Code

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SECRETARIES INCORPORATED
CLIENT LIST
ALPHABETIZED BY COMPANY NAME
CURRENT DATE

COMPANY NAME	ADDRESS	CITY	STATE	ZIP CODE
Attaway Marketing Inc.	9876 Bosque	Waco	TX	76710
Ballinger Marketing Service	5973 Broughton	Waco	TX	76710
Baylor Student	2345 Baylor Avenue	Waco	TX	76703
Cramer Employment Agency	3490 Fremont	Waco	TX	76710
Don Stubing, Contractor	2309 Westmerry	Waco	TX	76708
Downing, Inc.	3094 Patricia	Waco	TX	76703
Dumas Independent Agency	3490 Fremont	Bremont	TX	76895
Hathaway Plumbing	3459 S. Valley Mills	Waco	TX	76706
Henry's Interiors	234 Fernwood	Waco	TX	76709
James Cassidy, Attorney	2350 Winsor	Waco	TX	76710
James T. Baker, Attorney	2349 Danville	Waco	TX	76710
Jane Price, D.D.S.	658 Austin Avenue	Waco	TX	76703
Jeff Evans, Attorney	8905 Main	Clifton	TX	76894
John's Print Shop	4598 Main Street	Waco	TX	76708
Joshua's Real Estate	2406 Swinson	Waco	TX	76708
Prinston Mfg.	5320 Loop 340	Waco	TX	76708
Pumps, Inc.	5894 James Street	Waco	TX	76763
Smith Medi Center	1234 Sun Valley	Waco	TX	76710
Spenco Photography	4238 Santa Fe	Waco	TX	76707
St. James Hospital	8954 Westview	Waco	TX	76710
Student	3940 James	Waco	TX	76708
*The Learning Center	4102 Columbus	Waco	TX	76703
Thomas Johnson, M.D.	3405 Pine Street	Waco	TX	76710
Turner Travel Agency	2349 Fort Street	Waco	TX	76710
*Waco High School	1201 Lake Air	Waco	TX	76710
Waco Sport Club	4903 Sanger	Waco	TX	76710
West Maintenance	490 Fort Street	Waco	TX	76709
Williams Interior Design	2389 Springer Street	Waco	TX	76710
Wylie Real Estate	5940 West Avenue	Waco	TX	76710

** added records*

use client no - revised

Report Form clean to print

dBase3 Client File--Sorted by Company Name showing Company Name, Company Owner, Acct. No., and Telephone

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SECRETARIES INCORPORATED
LIST OF CLIENTS
ALPHABETIZED BY NAME OF COMPANY
CURRENT DATE

COMPANY NAME	COMPANY OWNER	ACCT NO	TELEPHONE
Attaway Marketing Inc.	Attaway, Tom	9875	765-3409
Ballinger Marketing Service	Ballinger, Stewart	0954	757-3439
Baylor Student	James, Harold	8574	755-3948
Crammer Employment Agency	Crammer, Ted	7856	765-2098
Don Stubing, Contractor	Stubing, Don	8907	765-1209
Downing, Inc.	Downing, Cory	9843	765-2341
Dumas Independent Agency	Dumas, Tye	0965	884-2094
Hathaway Plumbing	Hathaway, Tim	8765	765-2398
Henry's Interiors	Henry, Jennifer	6735	756-3298
James Cassidy, Attorney	Cassidy, James	6897	757-3674
James T. Baker, Attorney	Baker, James T.	8735	765-3290
Jane Price, D.D.S.	Price, Jane	3894	752-0945
Jeff Evans, Attorney	Evans, Jeff	3748	881-7943
John's Print Shop	David, John	8765	757-8963
Joshua's Real Estate	Aaron, Joshua	6324	752-8372
Prinston Mfg.	Prinston, Ed	8964	765-3409
Pumps, Inc.	Stimpson, Dan	3895	753-2050
Smith Medi Center	Smith, James T., MD	6785	767-2389
Spenco Photography	Spenco, Tammy	7645	756-3925
St. James Hospital	Stafford, Terry, Adm.	7654	765-2036
Student	Panque, Jamie	8643	765-3043
*The Learning Center	Jones, Donald	9877	757-3497
Thomas Johnson, M.D.	Johnson, Thomas H.D.	6754	765-3409
Turner Travel Agency	Turner, John P.	9876	765-3409
*Waco High School	Birdsong, Carol	9878	772-8429
Waco Sport Club	Swanson, Sam	7643	765-3209
West Maintenance	West, James	3472	765-9063
Williams Interior Design	Williams, Marcy	8768	765-3940
Wylie Real Estate	Wylie, Jim	0987	757-3409

* New records

use clients

Report from clients to print

dBase3 Client File--Sorted by Company Owner showing company
Owner, Company Name, Acct. No., and Telephone

Page No. 1
06/14/87

SECRETARIES INCORPORATED
LIST OF CLIENTS
COMPANY OWNERS AND TELEPHONE NUMBERS
CURRENT DATE

COMPANY OWNER	COMPANY NAME	ACCT NO	TELEPHONE
Aaron, Joshua	Joshua's Real Estate	6324	752-8372
Attaway, Tom	Attaway Marketing Inc.	9875	765-3409
Baker, James T.	James T. Baker, Attorney	8735	765-3290
Ballinger, Stewart	Ballinger Marketing Service	0954	757-3439
*Birdsong, Carol	Waco High School	9878	772-8429
Cassidy, James	James Cassidy, Attorney	6897	757-3674
Cramer, Ted	Cramer Employment Agency	7856	765-2098
David, John	John's Print Shop	8765	757-8963
Downing, Cory	Downing, Inc.	9843	765-2341
Dumas, Tye	Dumas Independent Agency	0965	884-2094
Evans, Jeff	Jeff Evans, Attorney	3748	881-7943
Hathaway, Tim	Hathaway Plumbing	8765	765-2398
Henry, Jennifer	Henry's Interiors	6735	756-3298
James, Harold	Baylor Student	8574	755-3948
Johnson, Thomas M.D.	Thomas Johnson, M.D.	6754	765-3409
*Jones, Donald	The Learning Center	9877	757-3497
Panque, Jamie	Student	8643	765-3043
Price, Jane	Jane Price, D.D.S.	3894	752-0945
Princeton, Ed	Princeton Mfg.	8964	765-3409
Smith, James T., MD	Smith Medi Center	6785	767-2389
Spenco, Tammy	Spenco Photography	7645	756-3925
Stafford, Terry, Adm.	St. James Hospital	7654	765-2036
Stimpson, Dan	Pumps, Inc.	3895	753-2050
Stubing, Don	Don Stubing, Contractor	8907	765-1209
Swanson, Sam	Waco Sport Club	7643	765-3209
Turner, John P.	Turner Travel Agency	9876	765-3409
West, James	West Maintenance	3472	765-9063
Williams, Marcy	Williams Interior Design	8768	765-3940
Wylie, Jim	Wylie Real Estate	0987	757-3409

* New Records
use Clinton
Report from clowner to print

dBase3 Client file--Sorted by Kind of Work showing Company
Name, Company Owner, Kind of Work, and Customer

Page No. 1
06/14/87

SECRETARIES INCORPORATED
LIST OF CLIENTS
KIND OF WORK
CURRENT DATE

COMPANY NAME	COMPANY OWNER	KIND OF WORK	CUSTOMER
Hathaway Plumbing	Hathaway, Tim	Billings	Monthly
Waco Sport Club	Swanson, Sam	Billings	Monthly
Downing, Inc.	Downing, Cory	Budget	Monthly
Cramer Employment Agency	Cramer, Ted	Client List	Monthly
Dumas Independent Agency	Dumas, Tye	Client List	Monthly
Don Stubing, Contractor	Stubing, Don	Contracts	Weekly
Henry's Interiors	Henry, Jennifer	Correspondence	Monthly
Attaway Marketing Inc.	Attaway, Tom	Correspondence	Monthly
*The Learning Center	Jones, Donald	Dbase & spread	Weekly
Jeff Evans, Attorney	Evans, Jeff	Dictation	As Needed
James T. Baker, Attorney	Baker, James T.	Dictation	Weekly
St. James Hospital	Stafford, Terry, Adm.	Dictation	Weekly
John's Print Shop	David, John	Draft Typing	Weekly
James Cassidy, Attorney	Cassidy, James	Legal Documents	Weekly
Prinston Mfg.	Prinston, Ed	Letter	Weekly
West Maintenance	West, James	Mailings	Monthly
Jane Price, D.D.S.	Price, Jane	Mailings	Monthly
Joshua's Real Estate	Aaron, Joshua	Mailings	Monthly
Spence Photography	Spence, Tanny	Mass Mailings	As Needed
Williams Interior Design	Williams, Marcy	Mass Mailings	Monthly
Turner Travel Agency	Turner, John P.	Mass Mailings	Weekly
Thomas Johnson, M.D.	Johnson, Thomas M.D.	Medical Doc	Weekly
Smith Medi Center	Smith, James T., MD	Medical Doc.	Monthly
*Waco High School	Birdsong, Carol	Spreadsheet	As Needed
Pumps, Inc.	Stimpson, Dan	Temporary	As Needed
Wylie Real Estate	Wylie, Jim	Temporary	As Needed
Ballinger Marketing Service	Ballinger, Stewart	Temporary	As Needed
Student	Panque, Jamie	Term Papers	As Needed
Baylor Student	James, Harold	Term Papers	As Needed

New Records

use clientwork

Report from clientwork to print

dBase3 Client File--Sorted by Acct. No. in ascending order
showing Company Name, Company Owner, and Acct. No.

Page No. 1
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SECRETARIES INCORPORATED
LIST OF CLIENTS
ACCOUNT NUMBERS
CURRENT DATE

COMPANY NAME	COMPANY OWNER	ACCT. NO.
Ballinger Marketing Service	Ballinger, Stewart	0954
Dumas Independent Agency	Dumas, Tye	0965
Wylie Real Estate	Wylie, Jim	0987
West Maintenance	West, James	3472
Jeff Evans, Attorney	Evans, Jeff	3748
Jane Price, D.D.S.	Price, Jane	3894
Pumps, Inc.	Stimpson, Dan	3895
Joshua's Real Estate	Aaron, Joshua	6324
Henry's Interiors	Henry, Jennifer	6735
Thomas Johnson, M.D.	Johnson, Thomas M.D.	6754
Smith Medi Center	Smith, James T., MD	6785
James Cassidy, Attorney	Cassidy, James	6897
Waco Sport Club	Swanson, Sam	7643
Spenco Photography	Spenco, Tammy	7645
St. James Hospital	Stafford, Terry, Adm.	7654
Crammer Employment Agency	Crammer, Ted	7856
Baylor Student	James, Harold	8574
Student	Panque, Jamie	8643
James T. Baker, Attorney	Baker, James T.	8735
Hathaway Plumbing	Hathaway, Tim	8765
John's Print Shop	David, John	8765
Williams Interior Design	Williams, Marcy	8768
Don Stubing, Contractor	Stubing, Don	8907
Princeton Mfg.	Princeton, Ed	8964
Downing, Inc.	Downing, Cory	9843
Attaway Marketing Inc.	Attaway, Tom	9875
Turner Travel Agency	Turner, John P.	9876
*The Learning Center	Jones, Donald	9877
*Waco High School	Birdsong, Carol	9878

* New records

use client no

Report form clno to print

dBase3 Client File--Sorted by Acct. No. in descending order
showing Company Name, Company Owner, and Acct. No.

Page No. 1
06/14/87

SECRETARIES INCORPORATED
LIST OF CLIENTS
ACCOUNT NUMBERS
CURRENT DATE

COMPANY NAME	COMPANY OWNER	ACCT. NO.
*Waco High School	Birdsong, Carol	9878
*The Learning Center	Jones, Donald	9877
Turner Travel Agency	Turner, John P.	9876
Attaway Marketing Inc.	Attaway, Tom	9875
Downing, Inc.	Downing, Cory	9843
Princeton Mfg.	Princeton, Ed	8964
Don Stubing, Contractor	Stubing, Don	8907
Williams Interior Design	Williams, Marcy	8768
John's Print Shop	David, John	8785
Hathaway Plumbing	Hathaway, Tim	8785
James T. Baker, Attorney	Baker, James T.	8735
Student	Panque, Jamie	8643
Baylor Student	James, Harold	8574
Crammer Employment Agency	Crammer, Ted	7856
St. James Hospital	Stafford, Terry, Ada.	7654
Spenco Photography	Spenco, Tammy	7645
Waco Sport Club	Swanson, Sam	7643
James Cassidy, Attorney	Cassidy, James	6897
Smith Medi Center	Smith, James T., MD	6785
Thomas Johnson, M.D.	Johnson, Thomas M.D.	6754
Henry's Interiors	Henry, Jennifer	6735
Joshua's Real Estate	Aaron, Joshua	6324
Pumps, Inc.	Stimpson, Dan	3895
Jane Price, D.D.S.	Price, Jane	3894
Jeff Evans, Attorney	Evans, Jeff	3748
West Maintenance	West, James	3472
Wylie Real Estate	Wylie, Jim	0987
Dumas Independent Agency	Dumas, Tye	0965
Ballinger Marketing Service	Ballinger, Stewart	0954

* new Records

was closed

Report from clno to print

Job 3--Print Out Secretaries Incorporated's Budget

The budget below is the beginning budget without the amounts entered in the present month's column. *This amount will vary according to the number hours put in by the student in producing the jobs.

SECRETARIES INCORPORATED
BUDGET FOR 1987

BUDGET ITEMS	LAST MONTH		
Beginning Balance	50226.76		
Income:			
Temporary Earnings	33034.34	*	
Free-Lance Earnings	24324.96	*	
TOTAL EARNINGS	57359.30	0.00	0.00
BALANCE + INCOME	107586.06	0.00	0.00
Expenses:			
Management Salaries	25054.34		
Employee Salaries	57098.45		
Advertising	503.34		
Building Lease	340.00		
Office Supplies	109.34		
Office Equipment	4423.09		
Insurance	96.50		
Liability Bond	250.00		
Utilities	134.56		
Answering Service	125.00		
Phone Service	57.34		
FICA Taxes	4325.34		
SS Taxes	1090.45		
Education	56.40		
TOTAL EXPENSES	93664.15	0.00	0.00
NET LOSS/GAIN	13921.91	0.00	0.00

Job 4--Print Out Client's Bills

The following spreadsheets will show the unit number, the job number, the description, the software used, and the charges per hour for the software. It will not show the final amounts because these amount will vary according to the time put in by the student.

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: James T. Baker
Address: 2349 Danville
City: Waco, TX 76710
Account No. 8735

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
U5-Job 1	Caption	DW4		10.00	0.00	0.00	0.00
U5-Job 2	Will	DW4		10.00	0.00		0.00
U5-Job 3	Land Des.	DW4		10.00	0.00		0.00
U5-Job 4	Interrog	DW4		10.00	0.00		0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Ballinger Marketing Service
Address: 5973 Broughton
City: Waco, TX 76710
Account No. 0954

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
U6-Job 1	Stat Table	DW4		10.00	0.00	0.00	0.00
U6-Job 2	Stat Table	DW4		10.00	0.00		0.00
U6-Job3	Para Align	DW4		10.00	0.00		0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: The Learning Center
Address: 4102 Columbus Avenue
City: Waco, TX 76703
Account No. 9877

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
U2-Job1	Data Base	dBase 3		9.00	0.00	0.00	0.00
U2-Job3	Rv Data Based	dBase 3		7.00	0.00		0.00
U2-Job 4	Budget	Lotus		10.00	0.00		0.00
U2-Job 7	Rev. Budget	Lotus		7.00	0.00		0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Carol Birdsong
Address: 1201 Lake Air
City: Waco, TX 76710
Account No. 9878

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
U2-Job 6	Grades	Lotus		10.00	0.00	0.00	0.00
U2-Job 8	Grades-Rev.	Lotus		7.00	0.00		0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Carol Birdsong
Address: 1201 Lake Air
City: Waco, TX 76710
Account No. 9878

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
U2-Job 6	Grades	Lotus		10.00	0.00	0.00	0.00
U2-Job 8	Grades-Rev.	Lotus		7.00	0.00		0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: James Cassidy, Attorney
Address: 2350 Winsor
City: Waco, TX 76710
Account No. 6897

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 29 87	Letters	DW4	2.50	10.00	25.00	0.00	25.00
		PAY THIS AMOUNT			0.00		25.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Crammer Employment Agency
Address: 3490 Fremont
City: Waco, TX 76710
Account No. 7856

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 14 87	Budget	Lotus	1.75	10.00	17.50	0.00	17.50
		PAY THIS AMOUNT			0.00		17.50

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: John's Print Shop
Address: 4598 Main Street
City: Waco, TX 76708
Account No. 8765

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 12 87	Newsletter	DW4	3.00	10.00	30.00	0.00	30.00
MAY 13 87	Report	DW4	2.50	10.00	25.00		55.00
May 30 87					0.00	25.00	30.00
U6-Job 5	Para Align	DW4		10.00	0.00		30.00
U6-Job 6	Tabulation	DW4		10.00	0.00		30.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Princeton Mfg.
Address: 5320 Loop 340
City: Waco, TX 76708
Account No. 8964

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
					0.00	0.00	0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Turner Travel Agency
Address: 2349 Fort Street
City: Waco, TX 76710
Account No. 9875

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
U6-Job 7	Boilerplate	DW4		10.00	0.00	0.00	0.00
U6-Job 8	Boilerplate	DW4		10.00	0.00		0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Smith Medi Center
Address: 1234 Sun Valley
City: Waco, TX 76710
Account No. 6897

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 29 87	data base	dBase	2.75	9.00	24.75	0.00	24.75
U3-Job 1	Med. Shells	DW4		10.00	0.00		24.75
U3-Job 2	H&P	DW4		10.00	0.00		24.75
U3-Job 3	Consult	DW4		10.00	0.00		24.75
U3-Job 4	Opera	DW4		10.00	0.00		24.75
U3-Job 5	Dis Sum	DW4		10.00	0.00		24.75
U3-Job 6	ShortSta	DW4		10.00	0.00		24.75
U3-Job 7	ShortSTa	DW4		10.00	0.00		24.75
U3-Job 8	Rad Report	DW4		10.00	0.00		24.75
U3-Job 9	Path Report	DW4		10.00	0.00		24.75
U3-Job 10	Autopsy	DW4		10.00	0.00		24.75
U4-Job 1	Reg Form	DW4		10.00	0.00		24.75
U4-Job 2	Release	DW4		10.00	0.00		24.75
U4-Job 3	App	DW4		10.00	0.00		24.75
U4-Job 4	Billing	DW4		10.00	0.00		24.75
U4-Job 5	List	DW4		10.00	0.00		24.75
U4-Job 6	List	DW4		10.00	0.00		24.75
U4-Job 7	List	DW4		10.00	0.00		24.75
U4-Job 8	Insur	DW4		10.00	0.00		24.75
U6-Job 9	Merge	DW4		10.00	0.00		24.75

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: St. James Hospital
Address: 8954 Westview
City: Waco, TX 76710
Account No. 7654

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
					0.00	0.00	0.00

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name: Wylie Real Estate
Address: 3940 West Avenue
City: Waco, TX 76710
Account No. 0987

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE
May 13 87		DW4	2.75	10.00	27.50	0.00	27.50
Unit 7	Report	Word Per		15.00	0.00		27.50

Evaluation:

Check printed documents to verify all changes were made.

UNIT 10
OFFICE AUTOMATION PROJECT

OFT 2402 Advanced Information Processing

INSTRUCTOR'S GUIDE

Unit 10

Unit Title: Office Automation Project

Contents of Unit:

1. Read the handout on the company to be automated.
2. Using the information provided by the instructor make decisions regarding computer software and equipment, printers, dictation equipment, OCR equipment copy equipment, teleconferencing, furniture and accessories.
3. Use spreadsheet package to evaluate each area of automation.
4. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Unit Objectives: Upon Completion of this unit, the student will be able to:

1. Research information about office automation and to make decisions regarding equipment, software, furniture, etc.
2. Merge all the paragraphs together into one report which contains both paragraphs and graphs made with a spreadsheet package.
3. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
4. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Students Laboratory Guide--Unit 10

Hardware: Microcomputer (640K) with two disks per student.

Software: DisplayWrite 4, Lotus 1-2-3

Procedures:

Discussion

Learning Activities:

Students are to follow instructions given in Student's Laboratory Guide to complete the Office Automation Report in Unit 10.

Key to Learning Activities:

There are five different companies for the students to automate. The handouts for these companies are attached. These handouts will tell about the company, its present equipment situation, and its future plans. The students will use these handouts as a starting place for automating the company.

The Student's Laboratory Guide for the students is set up so the student may work individually in completing the automation project. However, you may want to divide the students into groups to work on the project.

Since there are so many variables to this project, a sample finished report has not been provided. However, suggestions for each part are given below.

The instructor may grade each part as it is turned in and make suggestions regarding grammar, wording, and punctuation. The instructor may offer suggestions regarding decisions made by the student on the automation of the company.

Part 1 - Trip to Visit Your Company

The student should call a local travel agency or local air lines to inquire about flights and connections to the city where his/her company is located. The student is instructed to not make a reservation but to just inquire to find out a time and flight number.

The student should hand in a print out of the calendar showing the date he/she is leaving for the company and the flight number.

Part 2 - Calendar

The student will submit a print out of the calendar for one week later showing the day set aside for the head of the

company who will be visiting that day. The name of a restaurant should be in the noon line showing where they will have lunch.

Part 3 - Assessing Current Equipment

The student will compose a paragraph which summarizes the equipment currently being used by the company.

Part 4 - Work Flow, Documents, Centralized or Decentralized

The student will submit the following:

1. A paragraph describing the current work flow of the documents produced by the company.
2. A paragraph summarizing the documents produced by the company. The student must understand that the purpose of this summary is to decide which documents could be done in a word processing center according to certain procedures.
3. A paragraph describing the decision to centralize or decentralize the word processing in the company.

Part 4 - Reorganizing Personnel

The student will submit a reorganized organizational chart for the company reflecting any changes made in personnel.

Part 5 - Dictation Equipment

The student should submit the following:

1. A spreadsheet making a comparison of two or three different transcribers.
2. A paragraph with a graph of the comparison in No. 1 describing the process he/she used to choose transcribers for the secretarial staff. This paragraph should also include where these transcribers will be located in the company.
3. A spreadsheet making a comparison of two or three different desk-top recorders.
4. A paragraph with a graph of the comparison in No. 3 describing the process he/she used to choose desk-top recorders for the executives in the company. This paragraph should also include where these desk-top recorders will be located in the company.

5. A spreadsheet making a comparison of two or three different portable recorders.
6. A paragraph with a graph of the comparison in No. 5 describing the process he/she used to choose portable recorders for the executives in the company. This paragraph should also include where these portable recorders will be located in the company.
7. A general paragraph telling how many of each type of transcriber and/or recorder needs to be purchased and the total amount of the purchase. This paragraph should also include the type of tapes the student plans to use in the transcribers and recorders.
8. These transcribers and recorder will change the work flow. The student needs to submit a paragraph revising the previous work flow.

Part 6 - Choosing Word Processing Packages

The student should submit the following:

1. The student should submit a list of all the functions needed on a word processing software package to produce the documents used by the company.
2. A spreadsheet making a comparison of three or four different word processing software packages.
3. A paragraph with a graph of the comparison in No. 2 describing the process he/she used to choose a word processing software package for the secretaries in the company. This paragraph should include the package the student felt was the best for the needs of the company.

Part 7 - Choosing Spreadsheet Packages

The student should submit the following:

1. A spreadsheet making a comparison of three or four different spreadsheet software packages.
2. A paragraph with a graph of the comparison in No. 2 describing the process he/she used to choose a spreadsheet software package for the departments in the company. This paragraph should include the package the student felt was the best for the needs of the company.

Part 8 - Choosing Data Base Packages

The student should submit the following:

1. A spreadsheet making a comparison of three or four different data base software packages.
2. A paragraph with a graph of the comparison in No. 2 describing the process he/she used to choose a data base software package for the departments in the company. This paragraph should include the package the student felt was the best for the needs of the company.

Part 9 - Choosing Integrated Software for the Managers' Workstations

The student should submit the following:

1. A spreadsheet making a comparison of three or four different integrated software packages.
2. A paragraph with a graph of the comparison in No. 2 describing the process he/she used to choose a integrated software package for the departments in the company. This paragraph should include the package the student felt was the best for the needs of the company.

Part 10 - Choosing a Network System

The student should submit the following:

1. A spreadsheet making a comparison of three or four different network systems.
2. A paragraph with a graph of the comparison in No. 2 describing the process he/she used to choose a network system for the company. This paragraph should include the package the student felt was the best for the needs of the company.

Part 11 - Choosing Equipment to Run the Software and Netware Chosen

The student should submit the following:

1. A spreadsheet making a comparison of three or four different computer systems.
2. A paragraph with a graph of the comparison in No. 2 describing the process he/she used to choose a computer

system for the company. This paragraph should include the system the student felt was the best for the needs of the company.

Part 12 - Printers

The student should submit the following:

1. A spreadsheet showing the different kinds of printers--dot matrix, letter quality, laser, or ink jet. This spreadsheet will not be like the others. There will be no values in this one. This will be only "yes" or "no" in the columns to show what each kind of printer will do.
2. A paragraph comparing all the types of printers giving their general characteristics. This paragraph will serve as a preface to the next paragraph which explains the printers the student has chosen.
3. A paragraph describing the printers to be purchased for each group of employees (secretaries, executives, salesmen, etc.). The student should tell the best printer for each group and why that one is the best giving basic characteristics. The student will also need to include all of the accessories necessary for the printers.

Part 13 - Media Storage

The student should submit the following:

1. A spreadsheet making a comparison of two or three different micrographic processes.
2. A paragraph with a graph of the comparison in No. 2 describing the process he/she used to choose a micrographic process for the company. This paragraph should include the process the student felt was the best for the needs of the company.

Part 14 - Choosing OCR Equipment

The student should submit a paragraph telling the OCR equipment he/she plans to purchase and the special qualities of the equipment and how these qualities will benefit the company. This paragraph should include where the equipment will be located and who will use it. The OCR equipment should be compatible with the computer system chosen for the company.

Part 15 - Determining Teleconferencing Needs

The student should submit a paragraph telling the teleconferencing system he/she has chosen for the company. This paragraph should include a statement of how this system will benefit the company. If possible, the student should give the price of the system.

Part 16 - Evaluating the Telephone System

The student should submit a paragraph describing the telephone system which should include the special features of the system and how much it costs.

Part 17 - Choosing Office Furniture and Office Layout

The student should submit the following:

1. A layout of the word processing center or the departments where the secretaries will be located. This layout should include all furniture, computers, printers, wall divider, equipment, and other accessories. The layout should also show where the lighting is above the computers and where the windows are in relation to the computers.
2. A paragraph describing the items you have chosen. The student should describe the ergonomic significance of the furniture and equipment he/she has recommended the company to purchase. The student should also discuss color schemes, acoustics, environmental temperatures, and lighting. This paragraph or several paragraphs should be very detailed giving as many ergonomic rules as possible.

Part 18 - Training

The student should submit a paragraph describing how he/she will plan for training the employees of the company on the computers, the network, and the dictation equipment. The student should also make arrangements with the vendor to do a certain part of the training.

Final Project

The student should submit to you a finished copy of the final project. The project should include the following:

1. The student should use "get" to put all the paragraphs and graphs together.

2. The student should use transition words to bring the final report together in a unified manner.
3. The student should create a cover page and set the report up in business report style.
4. Depending on the amount of brochures you have on products, the student may use these pictures to better describe what they have chosen for the company. This will be a good time to let the student be creative.

Evaluating the Project

There are two ways to evaluate the project--grading each part as it comes in or grading the whole project.

There are advantages to grading each part as it comes in and these are as follows:

1. You will have immediate input as to the correct choices in equipment and procedures.
2. The student will have time to make corrections and additions to the project based on your comments.
3. You will know where the student is during the entire project.

The grade for the project could be based on the following:

- 60% - A grade given for the justification of choices in equipment, furniture, software, etc.
- 20% - Use of software to create the reports, graphs, and spreadsheet in order to evaluate equipment and software.
- 20% - Writing skills

In order to preserve security for these projects for future classes, the project and all notes and other work should be taken up by the instructor. The disks should be erased at the end of the course.

CONSULTATION PROJECTS

CONSULTATION PROJECT

AMARILLO COMMUNICATIONS COMPANY

Amarillo Communications Company is a television communications firm in Amarillo, Texas. In this office, there are 45 employees. The departments and personnel are as follows:

Director: 1 executive secretary
Producer: 1 executive secretary
Composition Department: 1 manager, 15 writers, 3 secretaries
Marketing Department: 3 marketing consultants, 1 secretary
Advertising Department: 2 writers, 1 draftsman, 1 secretary
Legal Department: 2 lawyers, 2 secretaries
Accounting Department: 2 accountants, 2 clerks, 1 secretary
Duplication Department: 2 operators
Music Department: 3 musicians

The director coordinates and manages the overall operation of the the business.

The producer is in charge of the budget and federal regulations.

The secretaries are generalists who perform both administrative and secretarial duties. However, the secretaries in the Composition Department are overwhelmed with work. The secretaries in the Legal Department are specialists because they do very little other than typing correspondence and legal documents.

Composition Department. The writers prepare scripts for 1-hour and 30-minute shows that air weekly. When writers prepare copy, it is given to at least two other writers for verification and then routed to management and the Legal Department for review. The writers create their material in longhand, which they give to the secretaries for drafting on electric typewriters. Four copies are made. These copies are distributed to two other writers, to the manager of the Compositions Department, and to the Legal Department. This department generates a large number of long scripts.

Marketing Department. The marketing consultants are responsible for handling the clients' request for ideas on marketing their products. This department must generate ideas and work up reports on these ideas which must be approved by the director and the Legal Department. They also must draw up examples for packaging products and for presenting these ideas to the clients. They also must handle new clients and generate business for the firm.

Advertising Department. The writers are responsible for writing material for advertisements to be aired on television and radio.

The artist is responsible for any drawings or graphs that will accompany the television advertisements. The secretary is responsible for the scripts needed for the advertisements and the reports sent to the director and producer.

Legal Department. The two lawyers are responsible for all contracts made with clients, television stations, and radio stations. They are also responsible for making sure the company is staying within the guidelines of the Federal Communication Commission (FCC).

Accounting Department. The accountants make decisions concerning the budget and cash flow. They also handle accounts receivable, accounts payable, and payroll. They must print the checks for the payroll and the accounts payable. They must generate reports to the director concerning these areas.

Duplication Department. The two operators are responsible for the copies needed by the various departments. They fill out printed forms concerning the amount of work they do each month.

Music Department. The musicians assist the Marketing Department and the Advertising Department by creating the music to accompany the advertisements.

Equipment in Use

1. Electric typewriters are used throughout the company.
2. One Xerox 2400 copier/duplicator with automatic feeding and collating.
3. Three-line touch-tone phone.

Method of Origination

Director: Dictates to his secretary

Producer: Dictates to his secretary

All other documents are handwritten.

Documents Produced

Director: correspondence, reports, forms

Producer: correspondence, reports, forms

Composition Department: scripts and reports

Marketing Department: correspondence, reports, forms

Advertising Department: correspondence, interoffice
correspondence, scripts, cartoons, drawings

Legal Department: correspondence, contracts, report

Accounting: reports of accounts, profit and loss statements,
 budgets, billings, checks, correspondence
Duplication Department: fill-in forms
Music Department: music

Reprographics and Filing

Four copies of all scripts--distributed to other writers,
managers, and Legal Department

One copy of all scripts kept by the manager of the Composition
Department to generate new ideas.

File copies of all correspondence are kept in each department.

Copies of each contract are kept in the Legal Department and the
Director's office.

Copies of all accounts receivable and payable are kept by the
Director and the Accounting Department.

Copies of all records of the payroll are kept by the Director and
the Accounting Department.

The only copy machine in the building is the one in the
Duplicating Department.

Distribution

All correspondence is sent by the U.S. Postal Service.

Scripts to the radio and television stations are hand delivered
because of speed and security.

Scripts used by National Networks must be sent by special carrier
because of the deadlines.

Communication

The telephone system is a simple PBX system consisting of three
lines. The secretary in the Marketing Department takes all
incoming calls and routes them to the other departments. There
is always a steady stream of calls which makes it impossible for
this secretary to get her work done. Also, the clients are
complaining because they cannot reach the people with whom they
need to talk.

Communication between the radio and television stations is vital
as well as communication between Amarillo and the networks.

Therefore you need to find a fast, secure method of sending scripts to these stations. Special delivery and hand delivery are too costly and time consuming.

Automation Needs

This company wants to automate by adding computers or word processors for the secretaries. Computers are also needed by the executives. The system of getting scripts to the networks and stations is outdated and costly. Therefore you need to look into telecommunications to help this area. The company needs to be networked internally and to outside companies. You will also need to purchase furniture and accessories for the equipment you purchase.

REQUIREMENTS FOR THE PROJECT

1. Assess the current equipment in use.
2. Establish work flow for documents.
 - a. Determine the type of documents created by each department.
 - b. Determine the best way to produce these documents.
3. Make decisions about office personnel.
 - a. Assess current positions and the duties of these positions.
 - b. Decide if some positions can be omitted or combined with other positions.
 - c. Reorganize the personnel.
 - d. Create a new organizational chart showing all the changes in personnel you have made.
4. Decide if your company needs a centralized, a decentralized, or a hybrid method of document production.
 - a. Decide how originals should be produced--handwritten, typed, or dictated.
 - b. Begin considering what type of equipment should be used.
 - c. Begin to decide what type of document production should be done by whom.
5. Decide whether your company should use dictation equipment.
 - a. Determine the needs of the originators and the secretaries producing the documents.
 - b. Decide whether to use desk top equipment, portable equipment, or a central system.
 - c. Determine the type of recording media you will use--standard, micro, mini, or pica cassettes or random access.

6. Research the document needs of your company and find software to meet those needs.
 - a. Find three word processing, data base, and spreadsheet software packages that will produce the documents you need--this will be narrowed down to one of each later.
 - b. Find one integrated package to be used by managers and secretaries.
7. Research the vendors for computers to run the software you have chosen.
 - a. Determine equipment that will meet the needs of your secretaries.
 - b. Determine the workstations that will meet the needs of your executives.
8. Determine whether your company will benefit from a network.
 - a. Determine what network you will choose.
 - b. Decide how your PCs will be hooked up to your network--star, bus, or ring.
 - c. Decide what employees in the company will have access to the network.
 - d. Determine if external networking will benefit your company.
 - e. Investigate the possibility of facsimile, communicating word processor or computers, or the use of vendors like MCI or Western Union.
9. Determine the media you will use to save your documents and information--floppy disks or hard disks.
10. Decide what kind of printers you will need in order to produce the documents needed by the company.
 - a. Impact or nonimpact
 - b. Accessories--tractor feed or pin wheel, sheet feeder, etc.
11. Determine if your company could benefit from OCR equipment.
 - a. Determine the kind of OCR equipment you need.
 - b. Determine where it will be located and who will use it.
12. Choose furniture and accessories for the equipment you choose.
 - a. Choose desks and tables for both secretaries and executives.
 - b. Choose chairs for both secretaries and executives.
 - c. Choose printer stands, sheet feeders, foot rests, copy holders, etc. as needed.
 - d. Draw a layout of the word processing center (if you have one) and the other secretarial areas showing where desks, chairs, computers, printers, OCR equipment, facsimile equipment, accessories, windows, lighting, etc. Remember to use your rules of ergonomics in choosing and placing furniture.

13. Determine your company's need for teleconferencing--video, audio conferencing, or audiographics.
14. Evaluate the telephone system for your company and select a new system if one is needed.
15. Determine the appropriate filing system for your company--paper files or magnetic media files. You will also want to look into micrographics for your files. Micrographics includes microfiche, microfilm, and aperture cards.
16. After you have selected the equipment needs for your company, determine how the employees will be trained to run the equipment and the software.

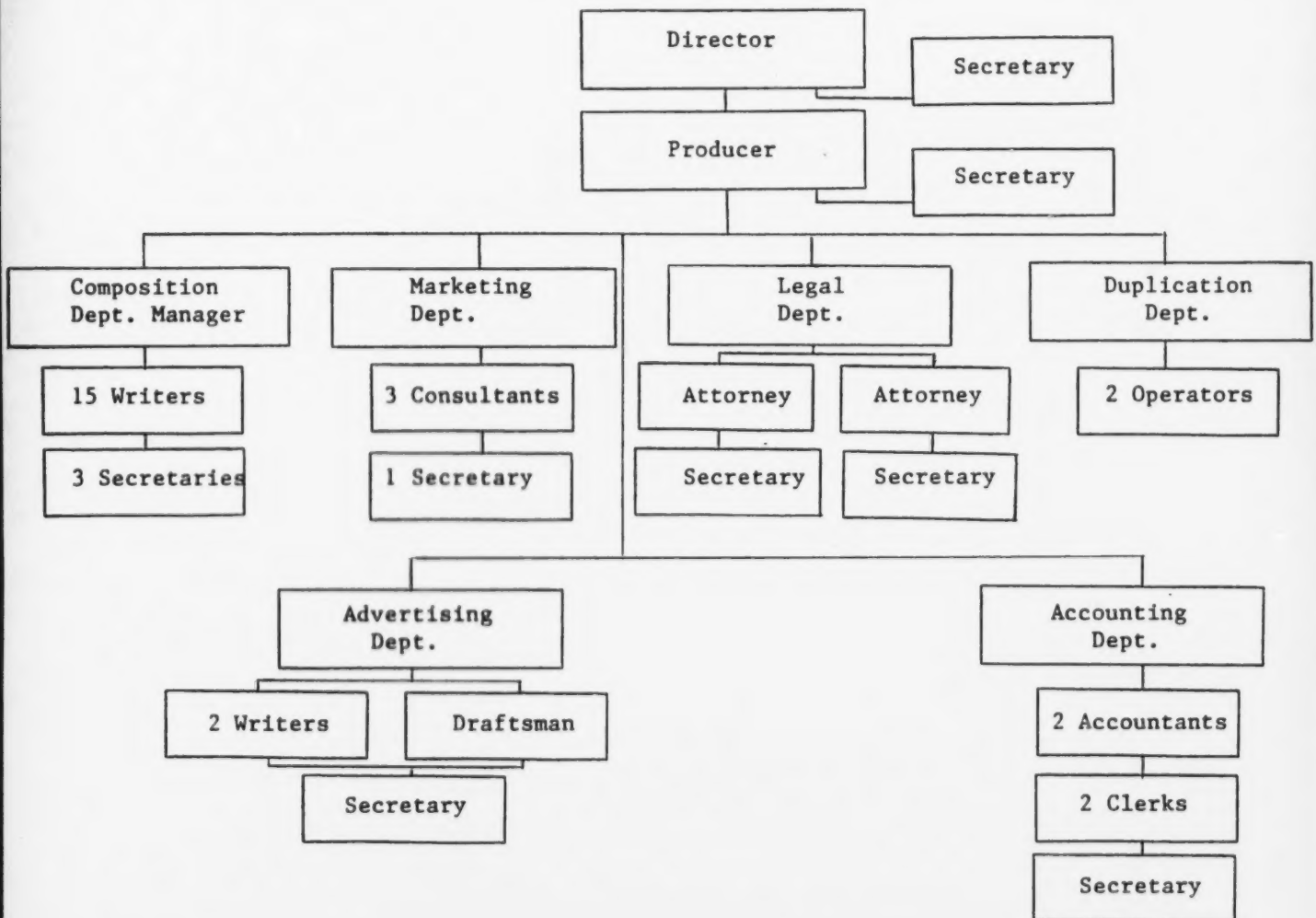
Final Document

You will need to produce a report to be presented to the head of the company in order for him to know what decisions you have made. You will need to use Lotus 1-2-3 to evaluate equipment and to help you make decisions. In the written report, you will need to produce from Lotus 1-2-3, graphs to demonstrate your decision. Therefore, you will be combining DisplayWrite 4 and Lotus 1-2-3.

Criteria for Grading the Final Document

1. Completeness of all the 16 items mentioned above.
2. There is no right or wrong decision. However, justification is the true test of your decisions. Make sure your company needs and can use the equipment you decide should be purchased.
3. Make sure you have included both written explanations and graphic pictures of your choices in equipment in your report.
4. Completeness of content is very important.
5. Correctness of sentence structure, grammar, punctuation, and word usage is next in importance.
6. Proofread your document carefully.
7. Use your imagination in putting your report together. You may use brochures and pictures to help convey your ideas.

AMARILLO COMMUNICATIONS COMPANY



CONSULTATION PROJECT

XYZ UNIVERSITY

XYZ University is small university. It offers associate and bachelor degrees. There are 480 employees. The departments and personnel are as follows:

10 Administrative Officials
10 Administrative Assistants
15 Area Coordinators of Departments
250 Faculty
50 Teaching Assistants
90 Secretaries
10 Faculty Development Department
45 Maintenance

Each administrative official has a secretary and an administrative assistant. Each area coordinator has at least one secretary who does typing for the coordinator and the faculty. Other secretaries are located in the Registrar's Office, in the Maintenance Department, and in the Faculty Development Department.

The secretaries for the administrative officials handle reports to the Coordinating Board and other state and federal agencies as well as reports on the campus. They also send correspondence on campus and off campus. Many reports must be accompanied with charts and graphs. These reports need to be of very high quality and must be sent in large quantities.

The area coordinator's secretaries do all the typing of reports, correspondence, classroom handouts, and tests. In addition, they must handle student advising records and mailings as well as area class schedules.

The administration has been considering setting up a word processing center and purchasing computers with word processing software. They are not sure whether a center is exactly what they want.

Equipment in Use

1. Electric typewriters are used at all secretarial stations except the president's and vice president's offices. They have word processors.
2. One Xerox 2400 copier/duplicator with automatic feeding and collating.
3. Switchboard phone system.

4. Two large mainframe computers are in use, one primarily for instructional purposes, the other for administrative purposes. However, the instructional computer is also used for a considerable amount of research, some of which is administrative in nature.

Method of Origination

Director: Dictates to his secretary
Producer: Dictates to his secretary

All other documents are handwritten

Documents Produced

Administrative Officials - on- and off-campus reports, on- and off-campus correspondence, class schedules, student transcripts, student attendance, accounts receivable and payable.

Area Coordinators - on-and off-campus correspondence, on-campus reports, student records, student advising, student schedules, course schedules, and degree plans.

Faculty - class notes, class handouts, tests, syllabi and correspondence.

Maintenance - reports, on-campus correspondence, and work orders

Faculty Development - transparencies, reports, on- and off-campus correspondence, classroom handouts, and testing procedures.

Reprographics and Filing

One large Xerox machine with collating capabilities for large jobs.

Distribution

All correspondence is sent by the U.S. Postal Service.

An organized campus mail service delivers mail twice daily, and a courier service and student employees can be used to hand deliver important papers as needed.

Communication

The telephone system is a simple PBX system consisting of one line leading on campus where an operator routes the calls. The

operator stays very busy. Securing an outside line is getting harder because the staff and faculty is growing due to increased enrollment. In fact, many faculty members share telephone extensions which causes confusion for the students.

Future Ideas

The Coordinating Board, which governs the college system in the state has just installed a large mainframe and a networking system. This new system makes it possible for the Board to communicate with colleges using the telephone. New rulings from the state have established a new procedure of reporting student enrollment changes immediately following registration with numerous reporting period during the school year. The Coordinating Board is also in the process of making major changes in its procedures and will be contacting the colleges for input for these procedures. It is important to your University to be able to communicate with the Coordinating Board daily.

Soon the faculty will be advising the student. They will need access to student transcripts and files. A college-wide network system is a necessity now.

Automation Needs

The company needs networking throughout the campus. They also need computers or word processors for the secretaries. The advising situation warrants computers in at least every department so the instructors will have access to the students' files. Since the campus is in constant contact with the legislature, they need telecommunications for daily or hourly contact. The University also need upgrading for furniture and accessory need. Also, the personnel needs to be reorganized. There are many other upgrading ideas that are need--use you imagination.

REQUIREMENTS FOR THE PROJECT

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 - b. Determine the best way to produce these documents.
3. Make decisions about office personnel.
 - a. Assess current positions and the duties of these positions.
 - b. Decide if some positions can be omitted or combined with other positions.

- c. Reorganize the personnel.
 - d. Create a new organizational chart showing all the changes in personnel you have made.
- 4. Decide if your company needs a centralized, a decentralized, or a hybrid method of document production.
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 - b. Begin considering what type of equipment should be used.
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- 5. Decide whether your company should use dictation equipment.
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 - b. Decide whether to use desk top equipment, portable equipment, or a central system.
 - c. Determine the type of recording media you will use--standard, micro, mini, or pica cassettes or random access.
- 6. Research the document needs of your company and find software to meet those needs.
 - a. Find three word processing, data base, and spread sheet software that will produce the documents you need--this will be narrowed down to one of each later.
 - b. Fine one integrated package to be used by managers and secretaries.
- 7. Research the vendors for computers to run the software you have chosen.
 - a. Determine equipment that will meet the needs of your secretaries.
 - b. Determine the workstations that will meet the needs of your executives.
- 8. Determine whether your company will benefit from a network.
 - a. Determine what network you will choose.
 - b. Decide how your PCs will be hooked up to your network--star, bus, or ring.
 - c. Decide what employees in the company will have access to the network.
 - d. Determine if external networking will benefit your company.
 - e. Investigate the possibility of facsimile, communicating word processor or computers, or the use of vendors like MCI or Western Union.
- 9. Determine the media you will use to save your documents and information--floppy disks or hard disks.

10. Decide what kind of printers you will need in order to produce the documents needed by the company.
 - a. Impact or nonimpact
 - b. Accessories--tractor feed or pin wheel, sheet feeder, etc.
11. Determine if your company could benefit from OCR equipment.
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 - b. Determine where it will be located and who will use it.
12. Choose furniture and accessories for the equipment you choose.
 - a. Choose desks and tables for both secretaries and executives.
 - b. Choose chairs for both secretaries and executives.
 - c. Choose printer stands, sheet feeders, foot rests, copy holders, etc. as needed.
 - d. Draw a layout of the word processing center (if you have one) and the other secretarial areas showing where desks, chairs, computers, printers, OCR equipment, facsimile equipment, accessories, windows, lighting, etc. Remember to use your rules of ergonomics in choosing and placing furniture.
13. Determine your company's need for teleconferencing--video, audio conferencing, or audiographics.
14. Evaluate the telephone system for your company and select a new system if one is needed.
15. Determine the appropriate filing system for your company--paper files or magnetic media files.
16. After you have selected the equipment needs for your company, determine how the employees will be trained to run the equipment and the software.

Final Document

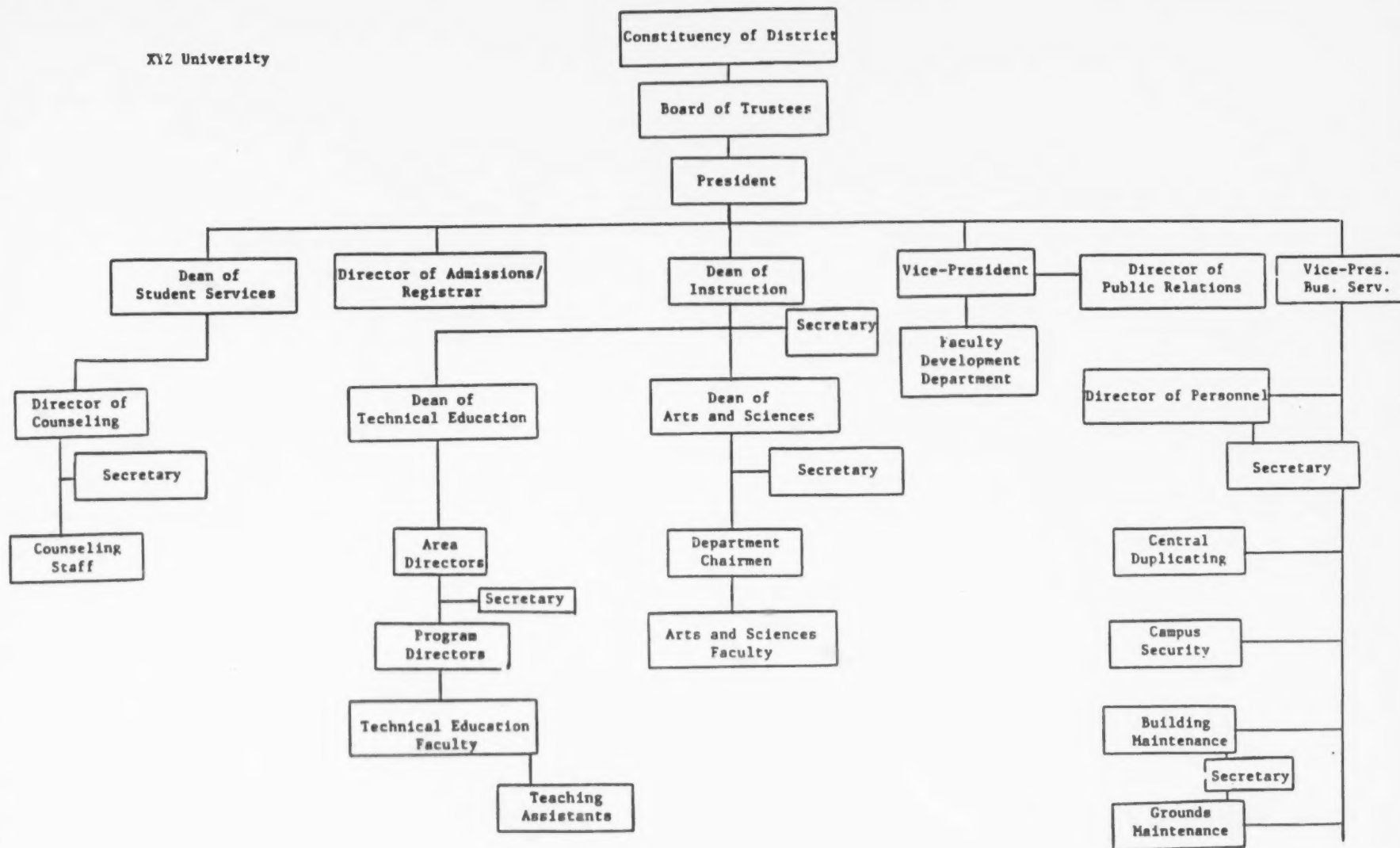
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2. There is no right or wrong decision. However, justification is the true test of your decisions. Make sure your company

needs and can use the equipment you decide should be purchased.

3. Make sure you have included both written explanations and graphic pictures of your choices in equipment in your report.
4. Completeness of content is very important.
5. Correctness of sentence structure, grammar, punctuation, and word usage is next in importance.
6. Proofread your document carefully.
7. Use your imagination in putting your report together. You may use brochures and pictures to help convey your ideas.



CONSULTATION PROJECT

GIBSONS INSURANCE COMPANY

Gibsons Insurance Company handles life, auto, and hospitalization insurance. In this branch office there are 75 employees. The departments and personnel are as follows:

Office Manager and	1 secretary
Claims Adjusting:	manager, 30 adjustors
Claims Processing:	supervisor, 2 clerks
Accounting:	manager, 3 clerks
Check Writing:	supervisor, 2 clerks, 3 typists
Legal:	manger, 4 attorneys, 3 secretaries
Sales:	manager, 5 field salesmen, 2 secretaries
Typing Center:	supervisor, 3 typists
Other Personnel:	receptionist, mail messenger, reproduction operator, and 6 other staff and clerical personnel

The secretaries are generalists who perform both administrative and secretarial duties. However, the secretaries in the Sales Department are overwhelmed with work. The secretaries in the Typing Center are specialists because they do very little other than typing correspondence and legal documents. The typists in the Check Writing Department type checks and prepare data for typing of check, which is a very specialized job.

Adjustors are one the phone a great deal of the time and write information which is supposed to be typed accurately by the typists. The typists complain because it is difficult to read the handwriting, and they are slowed down considerably in producing the work. There are complaints from the adjustors, too, when their work is backlogged. The office manager feels there are too many people processing checks--that too much time is spent writing down information for checks which must be mailed by noon of each day. Another problem is that the secretaries are overworked, typing to meet strict deadlines and quality requirements; they frequently work late or during lunch hours. Not surprisingly, there is a high rate of turnover, especially among typists.

Since this is a branch office, there is much correspondence to the home office in New York City. A need to a faster way of sending new applications, correspondence, and inquiries is of utmost priority.

Equipment in Use

1. Electric typewriters are used throughout the company.

2. One Xerox 2400 copier/duplicator with automatic feeding and collating.
3. Three-line touch-tone phone.

Method of Origination

Office Manager: Dictates to his secretary

All other documents are handwritten

Documents Produced

Office Manager: correspondence, reports, forms

Claims Adjusting: correspondence, reports, forms

Claims Processing: forms, reports

Accounting: correspondence, reports, forms

Check Writing: checks Legal: correspondence, contracts, report

Sales: correspondence, reports, proposals

Typing Center: correspondence, reports, proposals

Reprographics and Filing

This company has one Xerox copier. The secretaries use carbon paper for correspondence. The reproduction operator makes copies, which are generally of reports, checks, proposals, some correspondence, and legal document. The office manager feels carbon paper costs are high and copying costs are excessive. So they no longer copy many documents of over 15 pages, 15 copies per page.

The Typing Center keeps copies of all documents in three vertical files near the typists, but the adjustors also keep copies of correspondence in their desks. Daily correspondence is routed throughout the firm to keep all interested parties up to date. The legal secretaries keep records in vertical files which fill up one entire wall. The Claims Processing Department keeps records also, using a charge system. Also, each sales secretary maintains his/her own vertical files.

Distribution

All correspondence is sent by the U.S. Postal Service. Mail to other field offices is handled in bulk and mailed via the U.S. Postal Service. A mail messenger picks up/delivers internal mail at 10 a.m. and 3 p.m.

The mailing system is slow and the need for a speedier way of sending information to field office and to the home office is very urgent.

Communication

The telephone system is a simple PBX system consisting of three lines which are handled by the receptionist. Phone traffic is very heavy, resulting in many "held" calls and customer complaints. Communication between this office and field offices is very expensive and has deadlines. As a result sometimes a messenger must take mail by auto to meet deadlines. The phone system problems have become a major concern in this company, mainly because frequently the adjustors cannot get a free line; and they miss calls due to long incoming "hold" time.

Automation Needs

This company need to up dated by purchasing word processing equipment for its secretaries and computers for its salesmen and managers. Since policy information is constantly changing, the company should be networked within the office and with the home office. You will need to consider the best means for telecommunications. The company will also need new furniture and accessories.

REQUIREMENTS FOR THE PROJECT

1. Assess the current equipment in use.
2. Establish work flow for documents.
 - a. Determine the type of documents created by each department.
 - b. Determine the best way to produce these documents.
3. Make decisions about office personnel.
 - a. Assess current positions and the duties of these positions.
 - b. Decide if some positions can be omitted or combined with other positions.
 - c. Reorganize the personnel.
 - d. Create a new organizational chart showing all the changes in personnel you have made.
4. Decide if your company needs a centralized, a decentralized, or a hybrid method of document production.
 - a. Decide how originals should be produced--handwritten, typed, or dictated.
 - b. Begin considering what type of equipment should be used.
 - c. Begin to decide what type of document production should be done by whom.
5. Decide whether your company should use dictation equipment.
 - a. Determine the needs of the originators and the secretaries producing the documents.

- b. Decide whether to use desk top equipment, portable equipment, or a central system.
 - c. Determine the type of recording media you will use--standard, micro, mini, or pica cassettes or random access.
- 6. Research the document needs of your company and find software to meet those needs.
 - a. Find three word processing, data base, and spread sheet software that will produce the documents you need--this will be narrowed down to one of each later.
 - b. Fine one integrated package to be used by managers and secretaries.
- 7. Research the vendors for computers to run the software you have chosen.
 - a. Determine equipment that will meet the needs of your secretaries.
 - b. Determine the workstations that will meet the needs of your executives.
- 8. Determine whether your company will benefit from a network.
 - a. Determine what network you will choose.
 - b. Decide how your PCs will be hooked up to your network--star, bus, or ring.
 - c. Decide what employees in the company will have access to the network.
 - d. Determine if external networking will benefit your company.
 - e. Investigate the possibility of facsimile, communicating word processor or computers, or the use of vendors like MCI or Western Union.
- 9. Determine the media you will use to save your documents and information--floppy disks or hard disks. You will also need to look into micrographic. These micrographics should include microfiche, microfilm, and aperture cards.
- 10. Decide what kind of printers you will need in order to produce the documents needed by the company.
 - a. Impact or nonimpact
 - b. Accessories--tractor feed or pin wheel, sheet feeder, etc.
- 11. Determine if your company could benefit from OCR equipment.
 - a. Determine the kind of OCR equipment you need.
 - b. Determine where it will be located and who will use it.
- 12. Choose furniture and accessories for the equipment you choose.
 - a. Choose desks and tables for both secretaries and executives.
 - b. Choose chairs for both secretaries and executives.

- c. Choose printer stands, sheet feeders, foot rests, copy holders, etc. as needed.
 - d. Draw a layout of the word processing center (if you have one) and the other secretarial areas showing where desks, chairs, computers, printers, OCR equipment, facsimile equipment, accessories, windows, lighting, etc. Remember to use your rules of ergonomics in choosing and placing furniture.
- 13. Determine your company's need for teleconferencing--video, audio conferencing, or audiographics.
 - 14. Evaluate the telephone system for your company and select a new system if one is needed.
 - 15. Determine the appropriate filing system for your company--paper files or magnetic media files.
 - 16. After you have selected the equipment needs for your company, determine how the employees will be trained to run the equipment and the software.

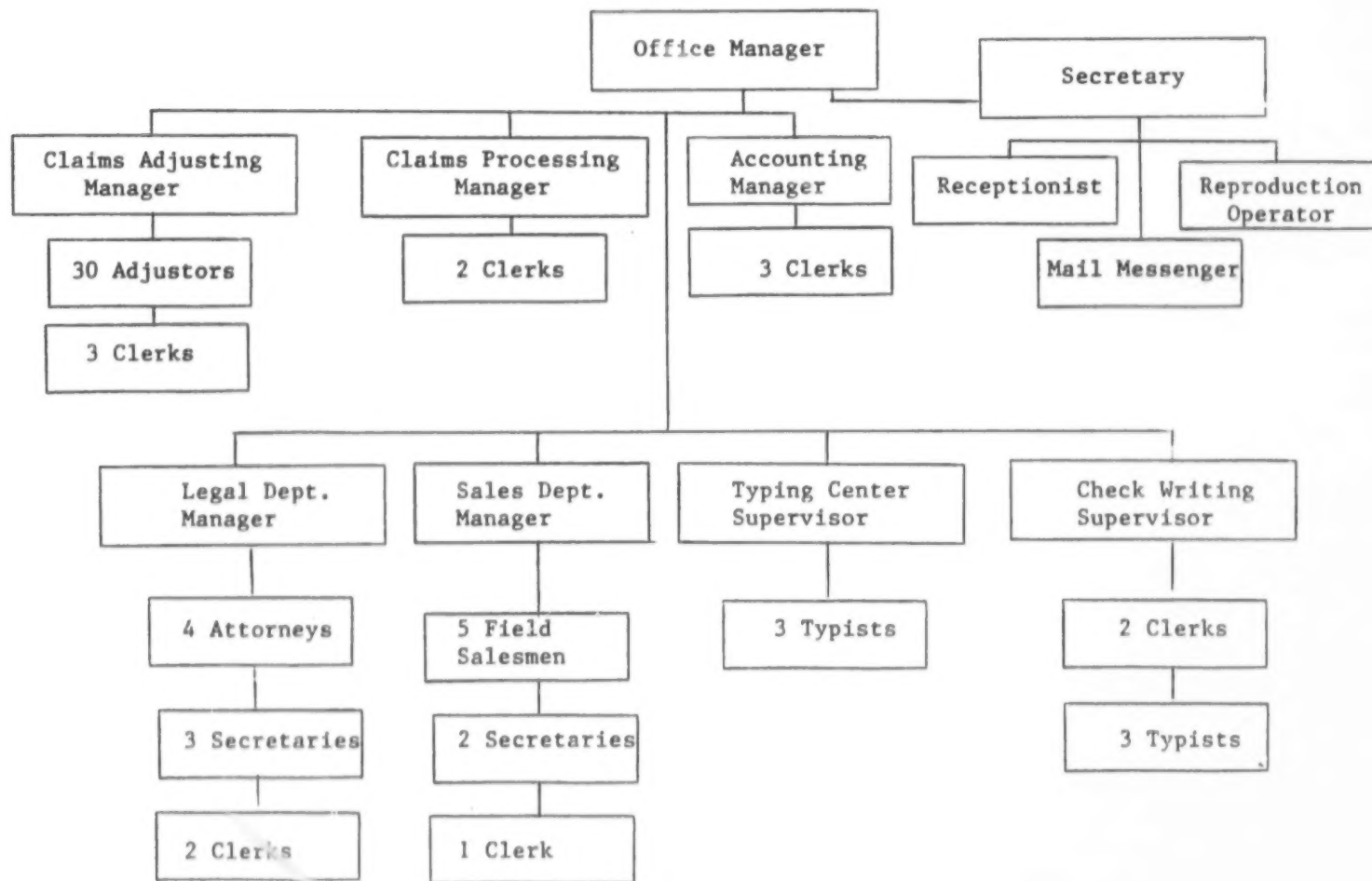
Final Document

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Criteria for Grading the Final Document

- 1. Completeness of all the 16 items mentioned above.
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- 4. Completeness of content is very important.
- 5. Correctness of sentence structure, grammar, punctuation, and word usage is next in importance.
- 6. Proofread your document carefully.
- 7. Use your imagination in putting your report together. You may use brochures and pictures to help convey your ideas.

GIBSONS INSURANCE COMPANY



CONSULTATION PROJECT

SAWYER BUSINESS PRODUCTS

Sawyer Business Products is a firm manufacturing and selling high-technology products in the office automation field. The home office is in Dallas. In this office, there are 50 employees. The departments and personnel are as follows:

President and Executive Secretary

Office Manager and Executive Secretary: Receptionist, Mail Messenger, File Clerk, and 3 part-time VOE students

Accounting Department: Manager and 3 Clerks

Legal Department: Manager, 1 Attorney, 1 Legal Secretary

Sales Department: Manager, 5 Salesmen, 2 Secretaries

Word Processing Center: Supervisor, 3 operators

Manufacturing Department: 21 Employees

The President coordinates and manages the overall operation of the business.

The Office Manager is in charge of the production of all documents in the company.

The secretaries are generalists who perform both administrative and secretarial duties. However, the secretaries in the Sales Department are overwhelmed with work. The secretaries in the Legal Department are specialists because they do very little other than typing correspondence and legal documents.

The Accounting Department handles all of the account receivable, accounts payable, and cash flow. They also handle all of the payroll for the employees and the commission for the salesmen.

The Sales Department handles all of the recruitment of new salesmen, sales quotas, and inventory.

The Legal Department handles all contracts with other firms.

The Word Processing Center handles the production of all documents for the home office and all of the regional offices. A copy of the original document is then mailed back to the regional offices for signing and distribution; a hard file copy of the document is kept at the home office.

The marketing structure is organized into regions, with the home office located in Dallas, Texas, and regional offices located in several major cities across the country: New York City, Miami, San Francisco, Seattle, Chicago, Denver, and Albuquerque. The company is constantly bringing out new products, and all leading salespeople in the region have been brought together to learn about new offerings. Such meetings have been conducted by

special staff from the home office who travel from region to region.

Under this plan, however, a number of problems have arisen. Complaints have come from the field that some districts obtain information before others, travel expenses for the home office staff who make the presentations have increased greatly, and turnover in these groups has been great because members do not want to travel so much. In addition, salespeople have indicated that coming together in such large groups has prevented them from seeing new products as well as they would like, scheduling problems for all travelers have been increasing, and travel costs are becoming so great that most branches are sending fewer people to the regional meetings.

Equipment in Use

1. Electric typewriters are used throughout the company.
2. One Xerox 2400 copier/duplicator with automatic feeding and collating.
3. Three-line touch-tone phone.

Method of Origination

President Director: Dictates to his secretary
Office Manager: Dictates to his secretary

All other documents are handwritten

Documents Produced

President: correspondence, reports, forms
Office Manager: correspondence, reports, forms
Accounting: reports of accounts, profit and loss statements, budgets, billings, checks, correspondence
Legal Manager: contracts, correspondence
Sales Department: price lists, brochures, correspondence
Word Processing Center: correspondence, reports

Reprographics and Filing

The only copy machine in the building is the one in the Word Processing Center.

Copies of the price list and inventory are duplicated at the home office and sent to the regional offices.

All brochures are sent to a printer which causes delays in getting brochures to the regional offices.

Distribution

All correspondence is sent by the U.S. Postal Service.

Price lists are sent through the mail which causes delays in getting prices to regional office.

Inventory reporting is done over the phone.

Communication

The telephone system is a simple PBX system consisting of three lines. The receptionist takes all incoming calls and routes them to the other departments. There is always a steady stream of calls. The clients are complaining because they cannot reach the people with whom they need to talk.

Automation Needs

The head of the company wants to network the home office and have a way of networking the regional offices to the home office. He would like to have PCs for all employees in the home office as well as all of the regional offices. The salesmen will need PCs as well in order to keep up with prices and inventory. The price lists and inventory should be on the computer so that salesmen and managers may know at all times the current price of items and the supply on hand. The personnel and the document flow is not working as it presently is; therefore, he wants you to reorganize the personnel and the document production. He also asks you to look into an alternate method of handling regional meetings and product presentations that will be faster and will cut down on travel costs.

REQUIREMENTS FOR THE PROJECT

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- 9. Determine the media you will use to save your documents and information--floppy disks or hard disks. You will need to look into micrographics--microfiche, microfilm, or aperture cards--as an alternate means of filing documents.

10. Decide what kind of printers you will need in order to produce the documents needed by the company.
 - a. Impact or nonimpact
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16. After you have selected the equipment needs for your company, determine how the employees will be trained to run the equipment and the software.

Final Document

You will need to produce a report the be presented the the head of the company in order for him to know what decisions you have made. You will need to use Lotus 1-2-3 to evaluate equipment and to help you make decisions. In the written report, you will need to produce from Lotus 1-2-3, graphs to demonstrate you decisions. Therefore, you will be combining DisplayWrite 4 and Lotus 1-2-3.

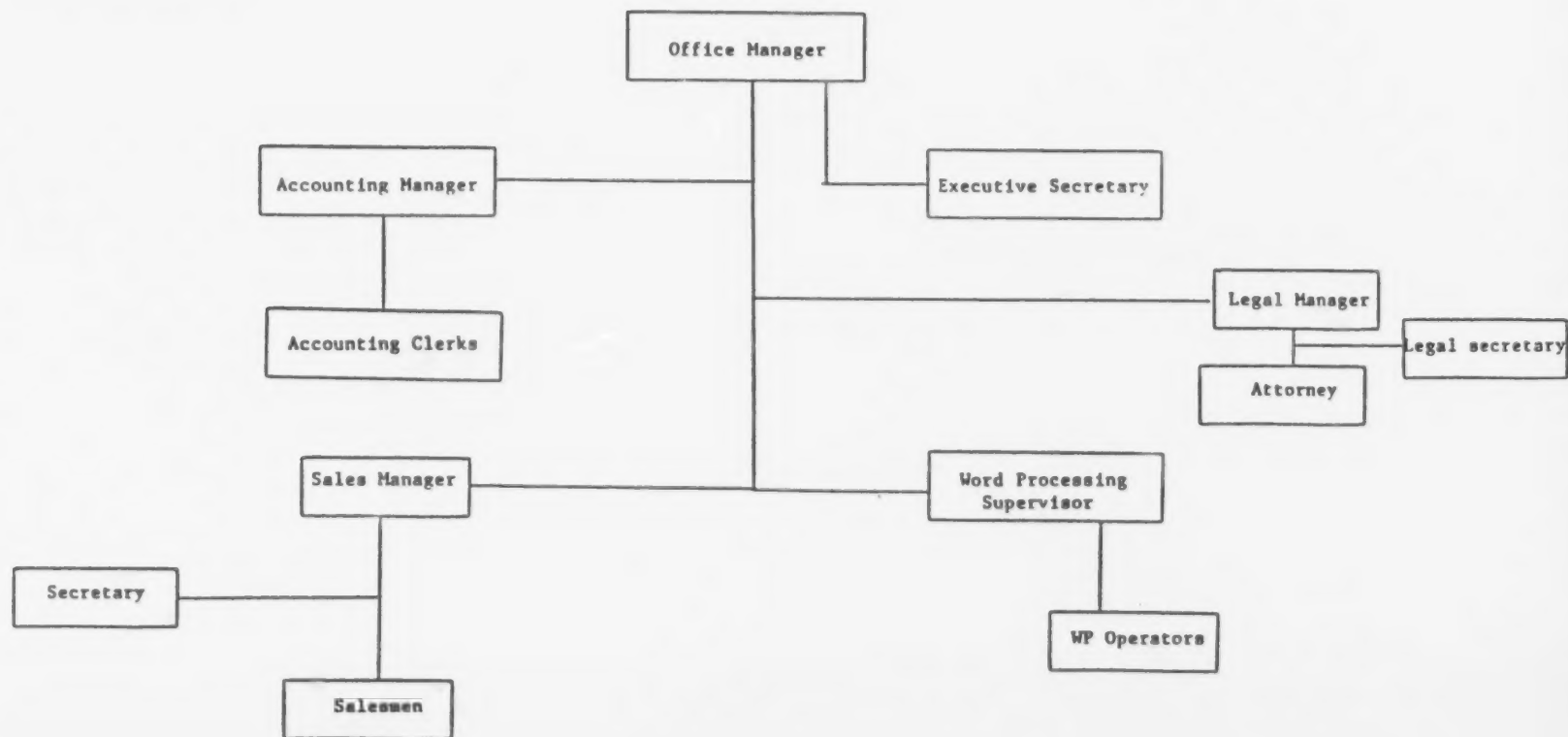
Criteria for Grading the Final Document

1. Completeness of all the 16 items mentioned above.
2. There is no right or wrong decision. However, justification is the true test of your decisions. Make sure your company

needs and can use the equipment you decide should be purchased.

3. Make sure you have included both written explanations and graphic pictures of your choices in equipment in your report.
4. Completeness of content is very important.
5. Correctness of sentence structure, grammar, punctuation, and word usage is next in importance.
6. Proofread your document carefully.
7. Use your imagination in putting your report together. You may use brochures and pictures to help convey your ideas.

SAWYER BUSINESS PRODUCTS



CONSULTATION PROJECT

SIMPLETON SAVINGS AND LOAN

Simpleton Savings and Loan is a branch lending institution in Dallas. The main office is in San Antonio, and you communicate with San Antonio daily. In this company, there are 25 employees. The departments and personnel are as follows:

President: 1 executive secretary
Vice President: 1 executive secretary
Accounting Department: 1 manager, 2 accountants, 2 clerks
Teller Department: 1 head teller, 7 tellers
Personnel Department: 1 manager, 1 secretary
Loan Department: 1 manager, 3 loan officers, 2 secretaries

The President supervises the entire business, but his main area of concern is the Loan Department. His secretary handles all of his correspondence and reports. She has an electric typewriter.

The Vice President supervises the Accounting, Teller, and Personnel Departments. His secretary handles all of his correspondence and reports. She has an electric typewriter.

The Accounting Department handles all of the recordkeeping for all of the accounts. They are responsible for maintaining the deposits and withdrawals of all accounts.

The Teller Department handle the teller windows. They are responsible for the exchange of money, deposits, and withdrawals.

The Personnel Department handles all hiring procedures for the company. This department is also in charge of the payroll.

The Loan Department is responsible for making and collecting loans. They must check the credit of those who are applying for a loan. They are also responsible for delinquent accounts.

Equipment in Use

1. Electric typewriters are used throughout the company.
2. One Xerox 2400 copier/duplicator with automatic feeding and collating.
3. Three-line touch-tone phone.

Method of Origination

President: Dictates to his secretary

Vice President: Dictates to his secretary

All other documents are handwritten

Documents Produced

President: correspondence, reports, forms

Vice President: correspondence, reports, forms

Accounting Department: accounts receivable and payable, profit
and loss statements

Teller Department: reports

Personnel Department: payroll, correspondence, reports

Loan Department: delinquent correspondence, reports, new
business correspondence.

Reprographics and Filing

The only copy machine in the building is the one in the
Loan Department.

Copies of all checks and statements must be kept for seven years.
Now they are being kept in files in the basement.

Each department is keeping its own files which is causing a great
deal of duplication.

Distribution

All correspondence is sent by the U.S. Postal Service.

Communication between the home office in San Antonio is done
through the mail which delays many transactions at least one day
and many times two days.

Communication

The telephone system is a simple PBX system consisting of three
lines. The secretary in the Personnel Department takes all
incoming calls and routes them to the other departments. There
is always a steady stream of calls which makes it impossible for
this secretary to get her work done. Also, the customers are
complaining because they cannot reach the people with whom they
need to talk.

Automation Needs

Simpleton would like to network the entire office so they may
communicate with each other spontaneously. They also want the
transactions of the tellers to be recorded in the mainframe
immediately upon entering the transactions on their equipment.

Word processing equipment is need to facilitate mass mailing, budgets, and profit and loss statement. The company wants to become totally automated. They also want to be able to communicate with the home office in San Antonio within seconds so that transactions and daily business volumes may be monitored within seconds.

REQUIREMENTS FOR THE PROJECT

1. Assess the current equipment in use.
2. Establish work flow for documents.
 - a. Determine the type of documents created by each department.
 - b. Determine the best way to produce these documents.
3. Make decisions about office personnel.
 - a. Assess current positions and the duties of these positions.
 - b. Decide if some positions can be omitted or combined with other positions.
 - c. Reorganize the personnel.
 - d. Create a new organizational chart showing all the changes in personnel you have made.
4. Decide if your company needs a centralized, a decentralized, or a hybrid method of document production.
 - a. Decide how originals should be produced--handwritten, typed, or dictated.
 - b. Begin considering what type of equipment should be used.
 - c. Begin to decide what type of document production should be done by whom.
5. Decide whether your company should use dictation equipment.
 - a. Determine the needs of the originators and the secretaries producing the documents.
 - b. Decide whether to use desk top equipment, portable equipment, or a central system.
 - c. Determine the type of recording media you will use--standard, micro, mini, or pica cassettes or random access.
6. Research the document needs of your company and find software to meet those needs.
 - a. Find three word processing, data base, and spread sheet software that will produce the documents you need--this will be narrowed down to one of each later.
 - b. Fine one integrated package to be used by managers and secretaries.

7. Research the vendors for computers to run the software you have chosen.
 - a. Determine equipment that will meet the needs of your secretaries.
 - b. Determine the workstations that will meet the needs of your executives.
8. Determine whether your company will benefit from a network.
 - a. Determine what network you will choose.
 - b. Decide how your PCs will be hooked up to your network--star, bus, or ring.
 - c. Decide what employees in the company will have access to the network.
 - d. Determine if external networking will benefit your company.
 - e. Investigate the possibility of facsimile, communicating word processor or computers, or the use of vendors like MCI or Western Union.
9. Determine the media you will use to save your documents and information--floppy disks or hard disks. You will also need to consider micrographics--microfiche, microfilm, and aperture cards--as a method of filing documents.
10. Decide what kind of printers you will need in order to produce the documents needed by the company.
 - a. Impact or nonimpact
 - b. Accessories--tractor feed or pin wheel, sheet feeder, etc.
11. Determine if your company could benefit from OCR equipment.
 - a. Determine the kind of OCR equipment you need.
 - b. Determine where it will be located and who will use it.
12. Choose furniture and accessories for the equipment you choose.
 - a. Choose desks and tables for both secretaries and executives.
 - b. Choose chairs for both secretaries and executives.
 - c. Choose printer stands, sheet feeders, foot rests, copy holders, etc. as needed.
 - d. Draw a layout of the word processing center (if you have one) and the other secretarial areas showing where desks, chairs, computers, printers, OCR equipment, facsimile equipment, accessories, windows, lighting, etc. Remember to use your rules of ergonomics in choosing and placing furniture.
13. Determine your company's need for teleconferencing--video, audio conferencing, or audiofiles.
14. Evaluate the telephone system for calls, teletype, and wire fax use system if one is needed.

15. Determine the appropriate filing system for your company--paper files or magnetic media files.
16. After you have selected the equipment needs for your company, determine how the employees will be trained to run the equipment and the software.

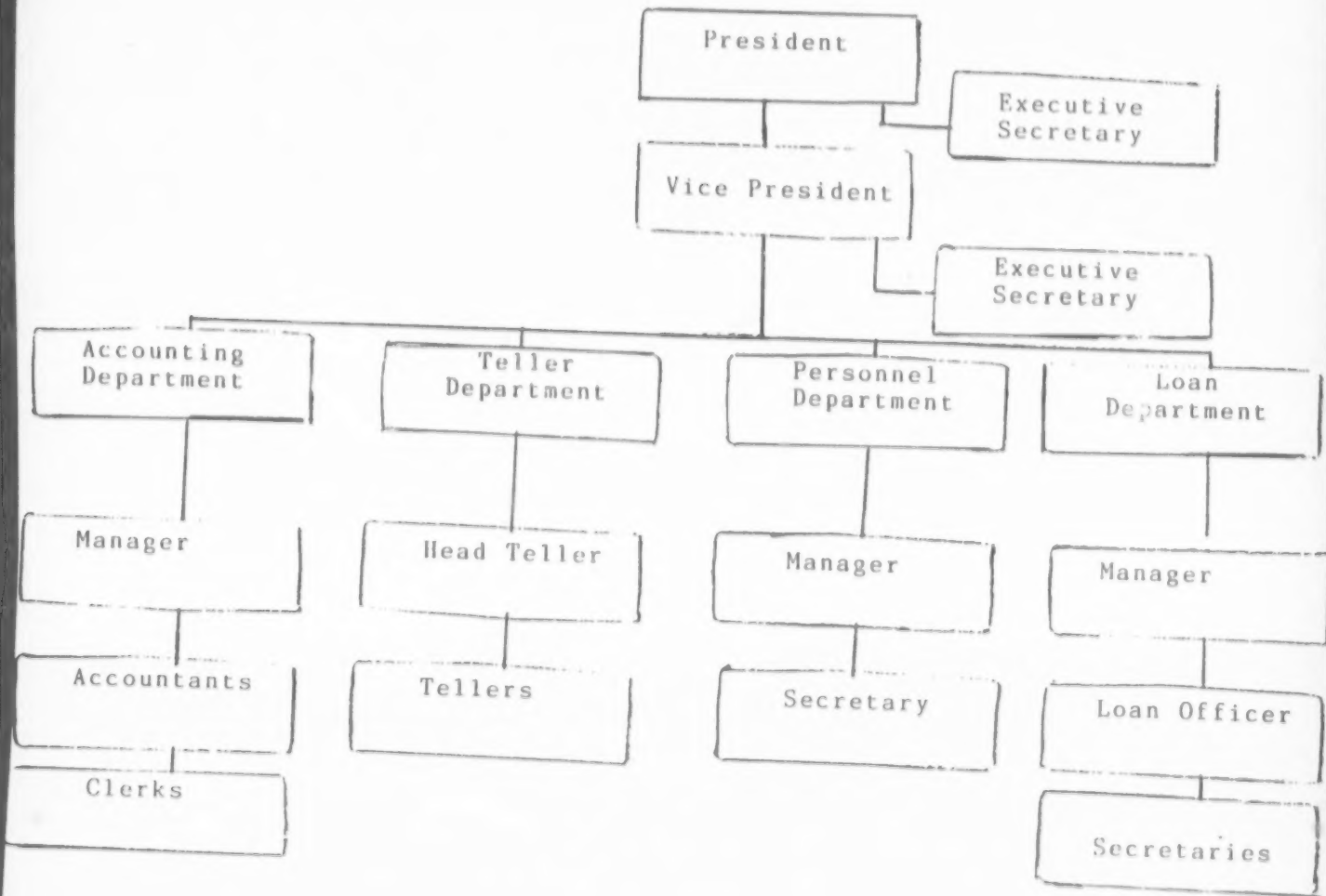
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SIMPLETON SAVINGS AND LOAN



UNIT 11
DECISION MAKING

OFT 2402: Advanced Information Processing

INSTRUCTOR'S GUIDE

UNIT 11

Unit Title: DECISION MAKING

Contents of Unit:

1. Group work on "Solve-a-Problem"
2. Group Work on "Caught in the Middle"

(This unit should be done at a time when all of the students can work together to add a change of pace to the course.)

Unit Objectives: Upon completion of this unit, the student will be able to:

1. Demonstrate decision-making skills by working with a group to solve typical office problem situations
2. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor
3. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given

Equipment and Materials Required:

Student Laboratory Guide--Unit 11
Forms for Unit 11
Discussion of group policy

Procedures:

Group Discussion

Learning Activities:

Students are to follow instructions given in students Laboratory Guide to complete two office problem situations in Unit 11.

Suggestions for Teaching this Unit:

This unit should be done in groups. It is best to have at least three members in a group. However, six is too many in a group. You will hand the sheets to the groups one at a time. They should work on a part and make decisions on that part before the instructor hands the student the feedback for that part. The next level of the decision-making process will be on that feedback sheet. Each project will take about one hour to complete.

Be sure each student has a worksheet.

Evaluation:

There are no right or wrong answers for these problems. Suggested feedback is given, but the students may have solutions that are just as usable as those given in the feedback section.

A grade will not be given for this unit. It is a good learning experience.

Solve a Problem

Goal of the
Project Work

Gather Information About the Problem

Who
What
When
Where
How
Why

Component Analysis

Possible Solutions

Constraints, Assumptions

Choose

Analysis Questions for the Detailed Solution

Who
What
When
Where
How
Why

Synthesis Answers: Step 1

Step 2

Evaluation of the Detailed Solution

Internal

External

Recommendations

Report

Implement the Solution

Check the Results

Source: TEACHING DECISION-MAKING: GUIDED DESIGN by Charles
Wales and Robert A. Stager, 1977.

Introduction

The urge to create seems to be innate or inborn. It follows, then, that the greatest thing that man can create in his lifespan is himself. . . . Out of the self the man creates. . . emerge all of the other things that are normally considered as creative: art, inventions, social systems.

A. H. Maslow

Many people believe the mission of education is to help each person achieve fulfillment. How to gain that goal is, however, a matter of vigorous debate. One view is well expressed by a proverb found in literature from around the world.

"If a person is hungry, you can
provide a fish or a fishing pole."

This book is addressed to those teachers who would give both. It describes an innovative educational approach, called Guided Design, which was created to provide both the fish and the pole.

Guided Design is an educational strategy that makes it possible for teachers to simultaneously accomplish two goals which have stubbornly resisted integration: 1) teaching subject matter and 2) developing the decision-making skills required to apply what has been learned to the solution of real world problems. With Guided Design, the teacher models professional reasoning and shows students how the material they study can be used to make better decisions. A by-product of this process is increased motivation which improves the students' retention of subject matter.

The promise of Guided Design has been realized by teachers in a variety of disciplines in high schools and in college at the undergraduate and professional levels. This book describes what these teachers did and what they learned in the process. Through this information we hope to show you that Guided Design is compatible with your needs, values, and past experience, that it is relatively easy to try on a small scale, that it is not a particularly complex innovation, that results are observable, and that there are many relative advantages in its adoption.

Educators who adopt Guided Design know that teaching is not just art based on the science of psychology, but form. Guided Design provides a form which allows the teacher to mediate, temporarily, between the student and the professional decision-maker. Through carefully drawn examples the teacher helps the student experience the freedom of effective decision-making along with the responsibilities that this freedom entails. The teacher brings together the neophyte and the master so that one can see the judgments of the other.

The substance of judgment is practice and action informed by practice. In Guided Design, learning is not left to happy chance, but organized by a skilled and disciplined teacher who has learned the errors of misplaced constraints, poor analysis, and myopic vision. Rene Dubos summed up these ideas quite well in his book *So Human an Animal*.

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Human freedom does not imply anarchy and complete permissiveness. Such attitudes would inevitably result in the disintegration of individual lives and of the social order. Rejection of discipline is unbiological because it is incompatible with physical, mental, and social health, indeed with the survival of the human species. Design, rather than anarchy, characterizes life. In human life, design implies the acceptance and even the deliberate choice of certain constraints which are deterministic to the extent that they incorporate the influences of the past and of the environment. But design is also the expression of free will because it always involves value judgments and anticipates the future.

Within the structure of Guided Design each individual is free to inquire, think, and express a viewpoint subject only to the inner checks of reason and conscience—learning in the process that an autonomous agent must assume responsibility for acts and conduct, as well as ideas; learning the place of empathy, moral judgments and the time to subordinate personal interests to the needs of others; and learning the role that continued study plays in better decision-making.

The real problem with 'knowledge' as it is defined in education today is a narrow viewpoint which limits both the form and scope of learning. It is true that education has to do with subject matter and achievement, but the legitimate range should be as Carl Rogers defined it, exercise for the whole person; memorization, yes, but application too, through both single-answer and open-ended problems. To know if what has been learned is of value, the students must have not only some concept of a standard by which to judge, but experience in making judgments. And just as what is studied grows in sophistication, so too should the knowledge of how to apply and evaluate.

To fully comprehend the ideas and works of others, students must be tuned-in to their own impulses and confront others thoughts by direct engagement and involvement. They must learn what questions to ask, what questions not to ask, and when to ask. To learn in a meaningful way, they must teach themselves. The teacher can anticipate their problems, their questions, their concerns, but no teacher can learn for a student. The sense of struggle must be with the student, the teacher can only provide the leading questions which prompt appropriate answers until emancipation occurs. The teacher is not an intellectual surgeon planting a pacemaker in the student's brain, but rather a midwife who assists in the delivery of a free mind: independent, but capable of commitment, playful, serious, adaptive, creative, an endurable human being in a tolerable world.

An anthropologist might express the philosophy of Guided Design this way:

**DON'T TEACH YOUR STUDENTS ANTHROPOLOGY. LET
THEM BE ANTHROPOLOGISTS!**

In other words, help the students see that anthropology is not only a body of knowledge, but ethics, principles, prophecies, lawful-deductive explanations, purposeful explanations, predictions, interviews, control groups, digging, sorting, and hard work. The teacher who agrees with this outlook should be quite well satisfied with Guided Design as a vehicle.

Because the title of this book is Guided Design, some might assume it is addressed to engineers. Because this book is concerned with the design of an educational experience some might think it speaks to faculty in education. Neither assumption is correct; this book courts all teachers who view themselves as "educational engineers" committed to the development of the students in their discipline. A title which better represents this common concern might be *Guided Decision-Making*, for that is the focus of what is presented here.

Who Should Use This Book

The ideas described in this book have been adopted by teachers in a variety of disciplines including the humanities (philosophy, drama, English), the social sciences (history, urban studies, international relations), natural sciences (chemistry, physics, biology), mathematics, engineering, business, technology, education, professional work (counseling and rehabilitation, nursing, veterinary pharmacology, dentistry, wildlife management), and in multidisciplinary studies. Although the book is focused on college level teaching, the ideas developed are applicable to all levels of education. The teachers who have tried this process have come from high schools, universities, continuing education and business training programs.

A GUIDED DESIGN FILM

The Exxon Education Foundation has produced and made available a 25-minute, 16mm, color film about Guided Design. The class meetings shown in the film illustrate the variety of applications possible with Guided Design in philosophy, anthropology, chemistry, theatre history, and engineering. The film is available on free loan from:

Film Scheduling Center
Modern Talking Picture Service, Inc.
5000 Park Street, North
St. Petersburg, FL 33709
Tel: (813) 541-5763

Written requests for the film should reach the Center 3 weeks in advance, specify a preferred and alternate show dates, and identify the film as *No. 31864 GUIDED DESIGN*. Telephone bookings must be placed at least ten days in advance of the show date.

The Exxon Education Foundation has no objection to videotape copies being made of this film, as long as such copies are of the entire film, including appropriate credits.

CENTER FOR GUIDED DESIGN

In 1982 a Center for Guided Design was established with a grant from the Exxon Education Foundation and support from West Virginia University. The Center provides information on Guided Design—what it is, who does it, where, and in what discipline—through a Newsletter and workshops. Center staff will give the workshops: six regional two-day workshops as well as five in-house workshops each year at colleges or universities where an active faculty instructional development program exists. The Center also plans to give talks or workshops at six national professional meetings each year. For more information on these or other workshops, contact Dr. Wales at the Center.

Chapter 1

An Introduction to Guided Design

Introduction

The obvious way to introduce a new concept such as Guided Design is to tell you about it and we plan to do that in this chapter. At the same time we want to demonstrate how the Guided Design process functions. To accomplish this, the first chapter in this book serves as a model of the way in which Guided Design might be introduced to a group of learners. We hope this pattern not only helps you understand Guided Design, but encourages you to try it in your classroom.

Guided Design is a new educational strategy, part system, part attitude. It reshapes the traditional approach to education by having learners, working in small groups, attack open-ended problems rather than masses of cold information. It is based on the conviction that the learner who works through an ascending order of well designed problems, the learner who is actively seeking solutions to problems rather than passively assimilating knowledge, will emerge not only better educated but far stronger intellectually.

How Guided Design Works

To provide for the systematic development of decision-making skills, Guided Design course activities are organized around the solution of a series of open-ended problems. Each problem is designed in such a way that to arrive at a solution, the students must apply the subject matter they are learning. The decision-making practice itself is guided by printed materials prepared by the teacher, material that provides students with a "slow-motion" experience with the solution of each problem.

The students use this material in class where they work in teams of five or six. Activity starts with an instruction that describes a problem situation and specifies the role the students are to play. Then they are asked to identify the "real" problem and set the goal for their work. After the group members agree on an answer, their result is compared with a printed feedback page which shows how others have responded. Students are not asked to agree with this answer, but rather to examine and consider other viewpoints. This pattern of question-response continues until the students complete their solution of the open-ended problem. The solution, however, isn't the important factor; *the process is*. The Guided Design process requires students to look closely at each of the steps in the decision-making process, apply the subject matter they have learned, exchange ideas with each other, and reflect on solutions developed by others.

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The solution of a given open-ended, Guided Design problem may take only two hours to as much as fifteen hours of class time. During this period of time learners are expected to study an appropriate amount of subject matter outside of class. However, the learners' motivation to study is improved because at least part of the subject matter is required to produce an effective solution to the problem chosen by the teacher. Thus, this information is always brought back to the group to provide optimum conditions for group problem-solving, with its give and take of ideas, insights, and opinions.

When the group has decided upon its action for the decision-making step under consideration, it is given the written feedback material prepared in advance by the teacher. The material presents one or more possible decisions the group may have reached at this point in its problem-solving, elaborating upon the strengths and weaknesses of each. After the learners compare the pros and cons of their decision with those in the feedback, they are allowed to advance to the next step in the problem.

Advantages of Guided Design

By focusing on both decision-making and the acquisition of knowledge, Guided Design brings knowledge alive as the tool of an active mind seeking orderly solutions to complex problems. The open-ended nature of Guided Design problems and the stress on group problem-solving brings this approach even closer to "real life" experience, where few problems are susceptible to a single, black or white solution and where many different opinions and values must be considered and reconciled in the decision-making process. In sum, learners not only acquire relevant knowledge under the Guided Design approach, but also develop their ability to learn on their own, think logically, gather the information they need to make intelligent decisions, make value judgments, communicate their ideas to others, and work as part of a team.

Genesis of the Idea

Guided Design was conceived and developed at West Virginia University by Dr. Charles E. Wales and Dr. Robert Stager (on leave from the University of Windsor, Ontario). Although it was designed as a better way of teaching engineering, it quickly became apparent that it could be adapted to many—perhaps most—disciplines.

The Idea Grows Up and Out

After its introduction in 1970 in freshman engineering at West Virginia, Guided Design was put into use in other university departments at both the graduate and undergraduate level. It is now used in chemical and civil engineering, counseling and guidance, rehabilitation, theatre (history, acting, and directing), philosophy, wildlife management, curriculum and instruction, geography, nursing, dentistry, physical therapy, political science, pharmacy, social work, reading education, and psychology. It also serves as the basis for an interdisciplinary course on the nature of evidence, which draws elements from the sciences, social sciences, and humanities, including English, philosophy, chemistry, psychology, and anthropology. Outside West Virginia, Guided Design is being used in,

for example, education, chemistry, mathematics, freshman studies, physical science, engineering, American studies, history, sociology, library science, veterinary pharmacology, and industrial training programs.

The Pattern of Guided Design

As you can see, Guided Design has been used in a variety of disciplines at both the graduate and undergraduate levels, in professional schools, and industry. Many teachers *begin* their course in the same way, which is what we want to describe and model now—both the pattern and the materials that can be used to start the Guided Design process. We plan to describe the operation first and then ask you to work through our Guided Design project, The Fishing Trip: An Introduction to the Process of Decision-Making.

The First Class Period

Before you begin reading this introductory project, we suggest you stop long enough to create a mental picture of who and where you are. *Visualize* yourself as a learner who has just entered the room where other learners sit in chairs which can be moved. The purpose of this first class is to introduce everyone to the process of decision-making.

A. Introduce the Learners to the Program

The first few minutes of this Guided Design operation are not particularly unusual. The teacher makes appropriate introductions and passes out a syllabus for the program which explains the general pattern of operation, the grading plan, and any other details which are pertinent. Then the new pattern begins.

B. Introduce the Process of Decision-Making

When the introduction is completed, the teacher passes out the first page of the Fishing Trip and asks each learner to read it and individually complete the "First Exercise" a ranking of 14 items. When all are done, the teacher organizes the learners into groups of four to six people and passes out the next page, which includes the "Second Exercise" and Instruction A. When a group indicates they have completed their discussion of the question in A, the teacher checks the project leader's list. If the group has done an appropriate amount of thinking, the next page is passed out, *Feedback A and Instruction B*. This process is repeated with each step until each group completes the project. (Note: This introductory project takes a little over one hour to complete; more complex subject-matter based projects generally take much longer.)

Now we'd like you to work through the "Fishing Trip" project as if you were a student in this class. Don't just read it—read each question and respond to it. Of course you will not have the advantage of a group to contribute ideas and debate those that are suggested. But play the game as best you can. After you reach a decision, read the Feedback which presents one view of what might have been decided. When you complete this project, we hope you will seriously consider trying it in your program.

The Fishing Trip: An Introduction to the Process of Decision-Making

INTRODUCTION

Many of you have probably gone on an automobile trip only to have the car break down on the highway. Although this can be inconvenient and annoying, help is usually within walking distance and there is little danger involved. In contrast, imagine the problem you might have if you had a breakdown while out in a boat on a fishing trip in the Gulf of Mexico. That's the situation we want you to deal with in this one-hour project. You will be asked to participate in this situation in two ways. First, there is an *individual exercise* in which you are asked to rank a list of items. Second, you are asked to work as *part of a team* to explore the best way to deal with the problem.

THE SETTING

It was the first week in August when four friends set out on an overnight fishing trip in the Gulf of Mexico. Everything went well the first day—the sea was calm, they caught fish, and later camped out on a lovely little island. However, during the night a very strong wind pulled the anchor free, drove their boat ashore, and the pounding waves broke the propeller. Although there were oars in the boat, the motor was useless.

A quick review of the previous day's journey showed that the group was about 40 miles from the nearest inhabited land. The small deserted island they were on had a few scrub trees and bushes, but no fresh water. They knew from their portable AM-FM radio that the weather would be hot and dry, with daytime temperatures expected to be over 100°F the rest of the week. They were all dressed in light clothing but each had a windbreaker for the cool evenings. They agreed that whatever happened they would stick together.

The families back on shore expected the group to return from their trip that evening and would surely report them missing when they didn't show up. However, they realized that it might take time for someone to find them because they went out further than anyone might have expected.

FIRST EXERCISE—INDIVIDUAL WORK

While some members of the group were quite concerned about this predicament, there was no panic. To help keep the group calm Jim suggested that they inventory the food and equipment available to them. "It might be several days before we are safe," Jim said, "and I think we should prepare for that." Kate, Tom and Ann agreed and their effort produced the list of 14 items given on the next page.

When this job was completed Ann suggested they move to the other side of the island. "We're on the south side of this island," she said, "and searchers are going to come from the mainland which is north of us. Even though the island is only a mile wide I'll

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bet we'd have a better chance of being spotted on the other shore." "Why don't we row the boat around?" Kate asked. "That's not a bad idea, Kate, but it must be about a two mile row," Tom said. "I'm not sure we should put out that kind of effort right now. I suggest we carry what we need across to the other shore, we can come back for the boat later if we decide we need it." "If we're going to do that," Jim said, "I think we should carry as little as possible. Why don't we *independently rank the 14 items we have available to determine which are the most important to take along*. The others agreed that without discussing the list with anyone else they would individually rank the items from number "1", for the item which was most important, to number "14", the item least important.

(We would like you to assume that you are a member of this group and individually rank these items on the form provided. *Write your list of numbers in the space marked Column A.*)

		Column				
Items Available		A	Z	B	Y	X
Each person has						
a.	one windbreaker					
b.	one poncho					
c.	one sleeping bag					
d.	one pair of sunglasses					
The boat contains						
e.	a cooler with two bottles of pop per person and some ice					
f.	one large flashlight					
g.	one first-aid kit					
h.	fishing equipment					
i.	matches, rope, and a few tools					
j.	one compass mounted on the boat					
k.	two rear-view mirrors which can be removed from the boat					
l.	one "official" navigational map of the Gulf area where you are					
m.	one salt shaker (full)					
n.	one bottle of liquor					

SECOND EXERCISE—GROUP DECISION-MAKING

Form groups of four to six people.

Introduction

The material you are about to use is concerned with decision-making, a basic intellectual process which makes it possible for each of us to face and solve new problems. This material is organized in an "Instruction-Feedback" pattern so you can participate in the solution of the problem. Each instruction presents a question the group on the island raised about one step in the decision-making process. We suggest that each member of your group read each Instruction, *discuss it with your team, decide on a group response*, and then compare the decision with the printed Feedback which your teacher will provide. This Feedback offers a summary of what your group has probably discussed and presents the decision made by the group on the island. You should realize that the purpose of the printed Feedback is to allow everyone to compare their reasoning with that of other people. No one should feel that they have to accept any of these decisions.

Your group should *appoint a project leader to record* the decisions made by the team. When the group feels they have completed their answer to the Instruction, ask the teacher to come to the group to check the work or have the leader take the record to the teacher. If the teacher believes the work is acceptable, the leader will receive copies of the Feedback and the next Instruction to give to the group. If the work is not yet acceptable, the teacher may ask questions to stimulate further thinking.

Instruction A—The Problem

When the group on the island finished their work on the list of items, Tom, who was visibly shaken, spoke up. "I'm not sure that what we have done so far makes any sense. I'm really worried!"

"Do you want to make a group list?" Jim asked. "Do you want to start walking?" Ann added.

"No," Tom said, "let's forget about walking and a group list for now. I think we should just *talk about what we are going to do about our problem.*"

(Assume you are the group on the island and continue this discussion. What are you going to do about this problem?)

Feedback A

The four friends had quite an animated discussion about what to do. Some of their ideas were to:

Row to shore or
Stay on the island and
Gather wood
Build a fire
Ration food and water
Catch fish
Build a shelter
Take the mirrors off the boat

Instruction B—Identify the Problem

Tom, who had now calmed down, spoke again. "I think we're making progress now, but I'm *not* sure we're on the right track. I get the feeling that all the ideas we listed should be called POSSIBLE SOLUTIONS—we talked about *what we should do to solve our problem*, *BUT NOT ABOUT THE PROBLEM THESE SOLUTIONS ARE SUPPOSED TO SOLVE.*"

"Tom's right," Kate said, "We can't generate intelligent possible solutions unless we know exactly what the problem is we face. Let's see if we can first *agree on the problem we want to solve.*"

The others agreed with Kate and they proceeded with this task.

Feedback B

This time the group came up with a list of what they thought might be the most basic problem. They said the problem might be that:

1. We're stuck on this island.
 2. The propeller is broken.
 3. Survival.
-

Instruction C—Identify the Problem

"Wait," Jim said, "I think we've got problems mixed with causes. It's a subtle difference, but an important one. The broken propeller and the fact that we're stuck here got us into trouble—they caused our problem, but the immediate problem we face is survival."

"I agree," Ann said, "but survival is too broad a word. We can't generate good solutions unless we *pinpoint* the problem that threatens our lives. I think we've got to define the most basic problem we face. *What is the specific problem that is most likely to threaten our survival?*"

Feedback C

After a brief discussion the group agreed that the immediate threat to their lives was either starvation, sunburn, or dehydration. Then they decided that they could get out of the sun and avoid a "burn". They could also eat fish so they wouldn't starve. But they had no source of fresh water. Thus, dehydration seemed to be the most serious problem and the one on which they should focus.

"It seems clear to me," Ann said, "that we have not only identified the problem we face, but stated the goal of our work as well, our *goal* is to stay alive by avoiding dehydration." The others agreed.

Instruction D—Facts, Assumptions, Constraints/Choose a Solution

"OK," Tom said, "our goal is to prevent dehydration. I suggest we pool what we know and list the facts, assumptions, and constraints which affect this goal."

"The *facts* are easy," Ann said. "We're stuck 40 miles from the nearest habitation where we can get help and it's going to be hot and dry during the day."

"Yes, and we can *assume* that our families will miss us and someone should be looking for us tomorrow," Kate added.

"And," Tom continued, "the *constraints* are that we have only the items on our list to work with plus the few trees, bushes, and the sand here on the island.

"Given this state of affairs," Jim added, "*let's make a list of the things we must avoid to forestall dehydration and then make our choice, either to stay on the island or to row to shore.*"

Feedback D

The group generated the following list. To avoid dehydration they would have to:

1. do as little exercise as possible
2. keep out of the sun and wind
3. eat nothing
4. avoid alcohol and salt

"I think we've got a good list," Tom said. "Now let's see if we can use it to *choose the best possible solution*. Since our goal is to avoid dehydration, the question we must answer is, How can we best avoid dehydration? We have two options, stay or row to shore. What should we do?" After a short discussion, the group agreed that staying on the island was the best possible solution because it would be easier to avoid dehydration if they could avoid the open water and the exercise involved in rowing the boat. They also agreed to wait until the cool of the evening to move across the island.

Instruction E—Analysis/Synthesis

"I think this is a good time to make use of the list of items Jim had us develop," Ann said. "Now that we know our goal is to prevent dehydration and the best possible solution is to stay here on the island, I think we should be able to *prepare a much better group ranking of the items we have available*."

"When we're done with the work on our group ranking," Kate added, "I suggest we *synthesize our thinking into a short statement that represents our final plan*." The group agreed and together they proceeded with their new ranking of the items.

(Each person should write the numbers selected by the group in Column B—leave Column Y blank for now. Please do not change the work you did earlier in Column A.)

Feedback E

The result of this Instruction is your ranked list of items.

The group summarized its thinking in the following way. Given all this information, the group's final decision was to stay on the island by the boat and wait for rescue. They would protect themselves from dehydration, from the sun and the hot dry air, by wearing the sunglasses and the windbreakers and developing a shelter with the sleeping bags. The mirror, flashlight, and a fire would be used to signal rescuers. The pop and ice water would be used as needed, but no food or liquor would be consumed. The ponchos would be used to make a solar still to produce more fresh water.

Information F—Evaluation

The group implemented their plan quite effectively and with excellent results. Everyone was in good shape when, three days later, a search plane came near enough to the island for them to signal with the mirror. A few hours more and a Coast Guard vessel came into view and the four friends were soon aboard enjoying a sweet sip of water. After they had rested, the Captain dropped in to ask them how they had survived in such good shape. The group described their decision-making and the lists they had prepared.

"I know a good deal about survival," the Captain said. "Why don't I rank the list of items and you can check your work against mine."

The group agreed and the Captain gave the following explanation.

(Write these numbers in Column X on the right.)

1. (k) *Two rear-view mirrors*

"The best way to avoid dehydration is to be rescued, so your first concern should be to develop a signal system. Because a search is most likely to take place in daylight, the mirrors are of prime importance—with a mirror you can generate a beam of light that can be seen over the horizon. You might get as much as 6 million candle power on a bright day. The chance of being rescued is about 80% if all you have is a mirror and sunshine and there is an air search.

2. (f) *One Large Flashlight*

"To complete your signaling potential, you should count on the flashlight. With the light and the mirror you can signal at night as well as in the daytime.

3. (i) *Matches, rope, and tools*

"Matches plus parts removed from the boat and/or gasoline provide another signaling device, a fire. The flame at night or smoke during the day should provide an excellent signal. In addition, the rope can help you create a daytime shelter.

4. (a) *Windbreaker*

"Your second concern should be to slow down dehydration by reducing both respiration and perspiration. To be effective at this task you should put yourself in the place of those who know how to survive in a hot, dry climate—the animals you have seen over and over again in Walt Disney movies and on Wild Kingdom TV shows. Animals, who live in a hot, dry climate, survive by staying out of the sun and limiting their activity. You can do the equivalent by staying quietly in the shade to reduce respiration and insulating yourself from the hot, dry air with the windbreakers. This will increase your survival time significantly.

5. (b) *One poncho each*

6. (c) *One sleeping bag each*

"These two items are considered together because both, in combination with the rope, can be used to create enough shade to reduce the temperature by up to 20%. This is an important reduction which can prolong life. You might also be able to use the poncho to create a solar still and produce some fresh water.

7. (d) *One pair of sunglasses each*

"By the second day, the intense sunlight can produce serious eye problems, equivalent to snow blindness. The shade provided by the shelter will help, but sunglasses offer additional safety.

8. (e) *The cooler of ice and pop*

"This amount of liquid will not offset the inevitable effects of dehydration. Thus there is no point in rationing the pop and water. Instead, it should be consumed when you are thirsty, on the first day, so you can keep a clear head as you make the important decisions that will affect your survival.

9. (g) *First-aid kit*

"This kit would be of value if anyone were hurt, but the island is likely to be a very healthy place because it is so dry. Even if someone were cut, they would not be likely to bleed because their blood is dehydrating and thickening.

Items of Little Value

10. (i) *Navigation map*

11. (j) *Compass*

"These two items are of value only if the group tries to row to shore which is likely to be a fatal mistake. If no one were looking for you, this might be a viable option, but it is not in this situation. You should use the map for a sun shade, to build a fire, or as toilet paper.

12. (h) *Fishing equipment*
13. (n) *Liquor*
14. (m) *Salt shaker*

"The fishing equipment could be used to catch food, but the activity would dehydrate you even faster. In addition, eating requires water for digestion so you would accelerate dehydration by eating.

"The liquor may be liquid, but in this case it's liquid death. Alcohol is a dehydrating agent so if you want to go fast, but happy, you should drink the liquor. It might better be used to cool the skin.

"Salt also acts as a dehydrating agent. You do not need to replace the salt in your blood, it is already too salty because you are dehydrating. Therefore, avoid the salt."

At this point Kate interrupted with a question. "I understand and agree with what you've said, but we felt that fixing a shelter was more important than worrying about rescue because we knew you wouldn't even begin to look for us until the next day."

"That's a good point," the Captain responded, "and I couldn't argue if you switched the list around with shelter first. The point is to avoid dehydration by either reducing it or getting off the island."

Instruction F—Evaluation

"The success of your plan was demonstrated when you were rescued in such good shape," the Captain said, "But let's see how well your choices stacked up against my evaluation. To determine how your group did compared to my advice, I suggest you score your work in the following way:

First Exercise—Individual Scores

1. "Subtract to obtain the '*absolute difference*' *A-X*, the difference between Column A (your individual ranking) and my ranking (X). Write the result in Column Z.
2. "Each person should add all the '*difference*' numbers in their Column Z to get a total for their work.
3. "Calculate an average individual score for your group: the sum of the Z results divided by the number in your group.

Second Exercise—Group Decision-Making Score

4. "Subtract to obtain the '*absolute difference*' *B-X*, the difference between Column B (the group ranking) and my ranking (X). Write the result in Column Y.
 5. "Add the '*difference*' numbers in Column Y to get a total score for the group ranking."
-

Feedback F

The Captain suggested that to see the evolution of their scores, the group compare the average individual score (Z) with the group decision-making score (Y). The point was well made because the four friends could see that their group score (Y) was lower (closer to the Captain's evaluation) than the individual score (Z).

The Captain summed up this work with the following points.

1. "Your results show what is generally true, that a group can usually arrive at a better decision than an individual, especially if the people in the group understand how to work together to share what they know and what they think.
2. "Your experience should also have illustrated that the more you know about the key elements involved in a problem, the more successful you are likely to be at finding a workable solution. For instance, in this problem, the more you know about dehydration the more likely you are to survive. In other words, the things you study and learn, whether in school or out, can help you be a more effective problem-solver.
3. "Your decision-making work is likely to be much more effective if you know which steps to take and how to use each step. If you are skilled at this process, you are less likely to commit one of the classic errors, such as generating possible solutions before you identify the problem to be solved. After you properly define both the problem and the goal, you are also in a much better position to decide what information you need to proceed intelligently.

"Perhaps I should stress," the Captain continued, "that identifying the problem and stating the goal are extremely important steps in the solution of any problem. If you have not done these steps properly, you are not likely to produce the best solution; you may miss possible solutions which should not be missed or perform an excellent analysis of the wrong problem. An example of this occurred in the early development of the U.S. space program when a problem similar to the following was posed.

Find a material which will withstand a temperature of 14,000°F for five minutes.

Of course this problem was related to the re-entry of a space capsule and the enormous amount of heat generated during the process.

"A great deal of time and money was wasted trying to solve this problem because there was no known material which would withstand the required temperature. Finally, someone realized that they were trying to solve the wrong problem. The new problem was stated as follows:

Find a way to protect a capsule and the person inside during re-entry.

This problem was solved very quickly with the ablation system that was used.

"The problem you faced on the island was very similar to this re-entry problem," the Captain said. "If you focus on getting to shore (which is a possible solution) and not the real problem of dehydration, then you are likely to miss the solution that results in survival."

Epilog

Through this problem we have tried to indicate in a very brief way that many steps are required in the solution of an open-ended problem. In the more involved problems which follow you will be asked to perform these steps, learning as you go how to perform them with greater and greater skill. As you work on each problem, you will be expected to use what you already know and to learn new fundamental principles which are required to produce the desired result. In this sense, you will be operating exactly like a problem solver in the real world, who commands a broad background but must often search out new information and skills to produce the best solution.

Before we move on to the next problem, it would be well for you to review the steps we have performed here. Although the order in which these steps are used may vary from problem to problem, the steps themselves are an important key to successful work. Try to list the steps we have used, then check your list against our "Steps in Decision-Making."

The Decision-Making Process

Identify the Problem The problem must be separated from its symptoms and properly identified (a critical step). Then you should be able to

State the Goal of Your Work The goal defines the specific result you expect to accomplish through your decision-making work. The next step should be to

Gather Information This step may also occur at other places in the process. The questions Who?, What?, When?, Where?, How?, and Why? should be useful. The answers are separated into columns of **What is?** and **What is not?** The next step is a

Component Analysis which is used to identify the major components of the problem/situation or system. The key question here is, "What major factors can be changed?" Then you should

Generate Possible Solutions which will achieve the goal. The question here is "How can each component be changed?" When this creative, divergent task is completed, it is appropriate to specify the

Constraints & Assumptions Constraints limit what can be done. Assumptions help simplify the problem. The next step is to make a

Choice A choice is made by applying the constraints and any other criteria which are relevant to the possible solutions and carefully examining the *positive and negative consequences* of different options. A table is sometimes used to help organize this work and the solutions may be ranked from best to poorest. The best solution is selected for further work. This is also a critical step in the decision-making process because a great deal of detailed work will follow. This work begins with an

Analysis of the chosen solution. An excellent way to perform this step is to identify all the components that must be considered and ask as many questions as you can about the choice using the words *Who, What, When, Where, How, and Why*. After all the components have been identified, it is time to begin the

Synthesis In step 1 the analysis questions are answered; in step 2 a detailed solution is devised. When this work is completed, an

Evaluation is performed to see if the plan satisfies the goal and meets any criteria that are appropriate. Here again the positive and negative consequences should be examined. If the evaluation shows that the solution is not acceptable, it may be necessary to return to the possible solution step, make another choice, and proceed again through the analysis, synthesis, and evaluation steps. If the work is acceptable a plan to evaluate the implemented solution should be devised. Then

Recommendations may be made and a

Report prepared. If the work is approved, you will

Implement the plan and prepare to

Check the Results

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Debriefing for the Teacher Congratulations!

You have just completed your first Guided Design experience. If you decide you'd like to try this approach, you should reproduce enough copies of our Fishing Trip project so each learner can have one set. *You have our permission to do this, as long as you give proper credit.*

If you decide to adopt the Guided Design style, this "Introduction to Decision-Making" is extremely important because it helps the learners understand the process which will be a prime focus of their work. However, we should point out that this introduction has two unique features which are not present in a typical Guided Design project. One is the scoring at the end of the project where the learners compare their solution with that of the captain. If you examine other Guided Design projects, you will see that the usual pattern used in Guided Design does not include this type of comparison and scoring. The second is the pace, this project has the form, but not the substance of a typical Guided Design project. The Fishing Trip takes a little over one hour to complete and it does not require the use of subject matter concepts. The projects used in a course involve the application of current subject matter and take from one week to five weeks of class time.

Even if you don't plan to convert to Guided Design, you may find this project valuable because of what it can contribute to your learners' abilities. For example, this material would be particularly appropriate in any course where the teacher already devotes some time to discussion activities. In fact, if you choose to teach the decision-making process with this material, we expect you will find the quality of the learners' discussion improved.

If you decide to use The Fishing Trip in your course, please note the following points.

- 1) If the group "Y" score is higher than the average "Z" score, it probably means the group had difficulty reaching a decision.
- 2) A group may decide to stay at the boat and see no need to group-rank the items. There are two good reasons why this job should be done: 1) it keeps the group busy while they wait quietly for the first day to pass and 2) they may panic later and decide to move north. If the list is completed, they will be better prepared for the move.
- 3) At the end of this project we point out to the the students that while the captain may be a very competent person, every professional has a point of view that affects the recommendations that are made. Rescue is the captain's business so a signal system is listed as "your first concern." That's bad advice. If you want to be alive for the rescue, your first concern should be dehydration. Kate made this important point quite well at the end of the Captain's ranking.
- 4) A survival expert would have listed the poncho-solar still and fishing equipment at the top of the list. The poncho can be stretched over a pit in wet sand so the sun will evaporate water which will condense on the underside of the poncho and drop into a container placed below the low point. In addition, *raw* fish provide both the fresh water that is needed and protein. The group could survive quite well on raw fish.

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May 12, 1987

Dr. Robert Wales
West Virginia University
P.O. Box 6101
Morgantown, VA 26506-6101

Dear Dr. Wales:

This letter is in response to our telephone conversation last week. Thank you for your enthusiastic response to my request.

I am a curriculum writer for the PVEP 1030--Curriculum Improvement Project. I am creating a course entitled Advanced Information Processing. I would like to put two of my decision-making projects in the course, but I need to use your description of the Guided Design process found on pp. iii-17 of your book, TEACHING DECISION MAKING: GUIDED DESIGN.

I have looked at the material you sent me; however, I will not have time to revise my Guided Design Projects. The Project Director has extended my time to May 23, 1987, but that still does not leave me time to revise these projects. If I get a change to revise before final publication, I will revise these projects.

Thank you for your help. Enclosed is a self-address, stamped envelope to help you get this letter back to me by May 23, 1987

Sincerely,

Linda Stanford
Linda Stanford
Instructor

I give Linda Stanford permission to print the above mentioned pages in the Advanced Information Processing Study Guide from TEACHING DECISION-MAKING: GUIDED DESIGN.

5/18/87
DATE

Charles E. Wales
SIGNED

SOLVE EXCESSIVE PHONE CALL PROBLEM

Instruction 1

Gather Information

Jane Edwards, Secretary at the ABC Company, a large manufacturing firm, has just returned from work, an hour late again. Her roommates are getting ready to go out for the evening and ask Jane to join them. "I can't," Jane said, "I'm exhausted."

"You've been like this for the last month," Ann said. "What's going on?"

"I'm not sure," Jane said.

"I don't need to go out tonight. Let's see if we can get to the bottom of this," Amy replied. "I just finished a course on decision-making at my company. Let me ask you some questions."

If you were Jane's roommate, what questions would you ask? At this point in the decision-making process, we cannot establish a goal. You must gather some information about the problem by asking questions in order to know what has happened. Then you will be able to establish a goal.

On the "Solve the Problem" outline write down the questions necessary to find out what happened at Jane's company. Use the Who, What, When, Where, How, and Why words.

Feedback 1

Gathering Information

Here are some possible questions:

Who else works overtime? Who is involved?
What has changed recently? What is company policy?
What do you do now that you didn't do before?
When did this overtime start?
How much extra work do you have?
Is it a new boyfriend?
Are you sick or worried?

Instruction 2

State The Goal

Jane had proven herself to be a very competent employee. She started as a clerk typist in ABC Company; and within one year, she was promoted to secretary. It has now been a year since she was promoted, and she has made many significant changes to enhance work flow and efficiency.

As Ann asked Jane questions, more information about the situation emerged. "Up until two months ago, I had stayed current in completing my work," said Jane. "Since that time, I have been putting in about one hour overtime almost daily. Now that I think about it, I am getting more calls than I have ever gotten before. Also, these calls are taking a lot of my time; and I cannot get my work done."

"You know, about two months ago we got a new receptionist, Mary; and she has been telling me what a good job I do in handling unhappy customers. Mary must be sending all the nuisance calls and anger-customer calls to me, which would account for the doubling of my calls," said Jane. "I realize this is a compliment to my diplomatic abilities, but I still must get my work done. I bet Mr. Jones, my boss, does not realize I am getting all these calls; therefore, he does not understand why I am behind all the time."

Ann says, "OK, now I understand the problem, what do you think the goal of our decision-making work should be?

Establish a goal for Jane on your "Solve a Problem" outline.

Feedback 2

State the Goal

Goal: To reduce the number of calls transferred to Jane.

Instruction 3

Components

"Before I came home tonight, I checked the company's policy and procedures manual; and I found that there had been no policy changes. Since the manual had been revised just nine months ago, Mary should be handling and distributing the call as the previous receptionist had routed them," said Jane.

Ann said, "Now that we have answered some questions about the problem and have gathered information about company policy, we need to narrow down the components of the problem. The components are the things or situations that can be changed. Therefore, we need to ask 'what can be changed?'"

List the components on the "Solve the Problem" outline.

Feedback 3

Components

Ann and Jane discussed the situation and concluded that Jane is the only component. The reason Jane is the only component is because she is acting on her own behalf; therefore, she is the only one who can make a change at this point. A decision must be made before Mary or Mr. Jones can change.

Instruction 4

Possible Solutions

"Now is the time to generate possible solutions," Ann said. "Let's begin to brainstorm and think freely to answer the question. What do we know about the problem? How can we change the component?"

List the possible solutions to the problem.

Feedback 4

Component Analysis & Possible Solutions

Jane can:

Continue taking calls & working overtime
Talk to Mary
Talk to boss
Not answer phone
Quit

Instruction 5

Constraints & Assumptions

"We should be ready now to specify the significant constraints and assumptions that may affect the solution of this problem," Ann said. "It may be helpful to use the component as our basis for generating some of the ideas."

Feedback 5

Constraints & Assumptions

Ann and Jane identified a number of constraints and assumptions. They were:

Talk to Mary
Mary might have a
negative reaction
Authority to make a
decision
situation out of

Talk to Boss
Mary feels reprimanded
Hard feelings between Jane
and Mary may result
Boss may blow

proportion
Reflection on Jane

Jane made the assumption that she could not continue to work overtime. She also assumed that Mary was not related to her boss or someone higher up in the company.

Instruction 6

Choose

"Are we ready to discuss the possible solutions and make a choice?" Ann asked. "To determine the best direction to go, we must consider the goal (to reduce incoming calls to Jane), the positive and negative consequences of each option, and the constraints."

Jane agreed that she had several options. She then decided to rank those options in order of preference and to choose one.

Feedback 6

Choose

After a discussion of the options, Ann and Jane decided on the best solution: For Jane to talk to Mary.

Even though Jane might get a negative reaction from Mary, this action would eliminate the need of taking this problem to the boss, and perhaps putting Mary or herself in a negative situation on her job.

Instruction 7

Analysis

"Now that we have come to a decision," Ann said, "We need to analyze the choice by identifying all the factors that must be considered. Here again the words who, what, when, where, how, and why should be useful. We will answer these questions in the synthesis step that follows."

Feedback 7

Analysis

These are the questions Ann and Jane prepared:

1. Who else should be involved?
 2. What will be discussed?
 3. When will Jane talk to Mary?
 4. Where will Jane approach Mary?
 5. How will Jane begin the discussion?
 6. Why would Mary react negatively?
 7. How long should it take for the goal to be achieved?
-

Instruction 8

Synthesis

"In the first synthesis step the analysis questions are answered," Ann said. "In the second step the detailed plan is organized and developed. That is what we need to do now."

Feedback 8

Synthesis

The answers to these questions will provide the basis for the detailed plan for handling the situation. The answers for Synthesis Step 1 Jane had were:

1. Jane will talk just to Mary.
2. Discuss Jane's problem plus give information about the departments and will suggest routing calls
3. Jane take Mary to lunch
4. At a quiet restaurant
5. "Mary, I think your voice is very pleasing on the phone, and you are an asset to our company. I also know you have told others how good you think I am at my job, but I have a problem that I want to discuss with you now."
6. She might take it as personal criticism and not professional constructive criticism.
7. One week

For Step 2, Jane told Ann exactly how she would accomplish her plans made in Step 1. These were:

Ask Mary only to lunch

Decide specifically where to have lunch--perhaps House of Chen

Open discussion with a compliment

Discuss the problem

During the discussion Jane can inform Mary of the various departments and their responsibilities as well as telling her the person in each department who should be receiving the calls.

Instruction 9

Evaluation--Internal & External

Ann said, "Evaluation involves two steps. The first one is an internal one in which you and I, the decision-makers, decide if we think our solution will work to solve the excessive phone call problem. If we decide it will not, then we return to the possible solutions step to make another choice and proceed again through the analysis, synthesis, and evaluation steps."

Ann continued to explain, "The external evaluation is the specification of how we will determine if our plan has worked. What things will we see taking place if the plan is working?"

Feedback 9

Evaluation - Internal & External

The external evaluation would be done by Jane because only she could judge whether or not there has been a decrease in the amount of work she was getting accomplished and the number of calls she was getting within one week after the discussion.

Instruction 10

Recommendations

Jane decided that within one week she should be able to determine whether or not the plan was successful.

Before Jane could actually carry through with her plans, Ann said, "I would like you to outline the following steps:"

Recommendations: We might recommend that each new employee be given a personnel manual and information about each department and the contact people in the departments.

Report: Since only Mary and Jane were involved, a written report would not be needed, but a verbal one could be given.

Implement the Solution: Jane decided to immediately discuss the situation with Mary, and that Mary would immediately implement the solution of routing the calls to others.

Check the Results: After one week Jane and Mary could discuss how the new system was working.

SOLVE THE EXCESSIVE PHONE CALL PROBLEM

Situation Jane Edwards, a secretary at ABC Company, is receiving more phone calls than ever before from annoyed customers, which is taking up a lot of her time. Consequently, she is not getting her work done.

Defining the desired result is necessary in order for Jane to get her work done. Mary must learn to route the phone calls to the appropriate people.

Gather Information About the Problem

Who else works overtime? (no one else)
Who is involved? (Jane and Mary)
What has changed recently? (Receptionist)
What is the company policy? (not given but no change)
What do you do now that you didn't do before? (overtime and more calls)
When did this start? (two months ago)
Is it a new boyfriend? (no)
Are you sick or worried? (no)

Goal Solve: To reduce the number of calls transferred to Jane.

Component Analysis: Jane

Possible Solutions:
Talk to Mary
Talk to boss
Continue to answer calls
Not answer phone
Quit

Constraints & Assumptions: Talks to Mary
Mary's negative reaction
Authority to make the decision

Talks to Boss
Mary feels reprimanded
Hard feelings between Jane and Mary
Boss blows situation out of proportion
Reflection on Jane

Choose: Jane should talk to Mary.

Analysis Questions for Detailed Solution:

1. Who is going to implement solution?
2. What is going to be discussed?
3. When will Jane talk to Mary?
4. Where will Jane approach Mary?
5. How will Jane begin the discussion?
6. Why would Mary react negatively?
7. How long should it take for the goal to be achieved?

Synthesis: The analysis questions were answered:

1. Jane will implement solution
2. Present problem; give information about departments; and suggest routing
3. Take Mary to lunch
4. To a quiet restaurant
5. "Mary, I think your voice is very pleasing, and you are an asset to our company. I have a problem I want to discuss with you."
6. She might take it as personal criticism and not professional constructive criticism.
7. One week

Evaluation: Internal - The plan does satisfy the goal.
External - Jane getting her work done during regular 8-hour day is measure of success.

Recommendations: Be sure each new employee gets a personnel manual and is given information about each department and contact people in those departments.

Report: Verbal discussion.

Implement the Solution: Implemented immediately after the discussion between Jane and Mary.

Check the Results: After one week Jane and Mary could discuss how the solution was working.

CAUGHT IN THE MIDDLE--SOLVE THE PROBLEM

Instruction_1

Situation

Jean Smith, copywriter for an advertising agency, handed a 24-page market analysis to her secretary, Judy Dale, saying, "Take this down to Reprographics and tell them that this is a rush job. We have to have ten copies, collated, and bound by four o'clock tomorrow, even if they have to let some of their other work go until later."

Aware that her employer had a reputation for making everything a rush job, Judy approached Joe Santini, supervisor of duplicating, with the written job order in hand and said cautiously, "Listen, Joe, Ms. Smith is really in a bind. She has to have ten copies of this market analysis by four o'clock tomorrow, and she knows that she can depend on you to get her out of this crisis."

Joe was unimpressed. "You tell that boss of yours that she has to learn that there are other people in this company who need duplicating. She just has to wait her turn. Look at that pile of work orders. Do you think that she has any right to ask to be put ahead of those requisitions? I've done my last rush job for Madam Smith."

Judy returns to her office with the "unduplicated" report in her hand. Judy must now decide what to do next. Since Judy must make the "right" decision, she decides first to establish her "true" goal.

On your "Solve a Problem" sheet, write down Judy's goal.

Feedback_1

State_The_Goal

Goal: To get the 24-page report printed, collated, and bound by 4 p.m. the next day.

Instruction_2

Gathering_Information

In order for Judy to accomplish her goal, she must have more information about the situation before she can decide upon her plan of action.

On the "Solve the Problem" outline write down the questions necessary to find out more about the meeting scheduled for tomorrow and the people involved in that meeting, about Joe's duplicating department, and options open to Judy. Use the Who, What, When, Where, How, and Why words.

Feedback_2

Gathering_Information

Here are some of the questions Judy decided to ask:

- Who else could do the duplicating?
 - What can (Judy) do to help with the duplicating process?
 - When are the clients suppose to arrive?
 - Can the clients be reached to postpone the meeting?
 - How can Judy persuade Joe to do the duplicating?
 - What information will Judy need in order to persuade Joe to do the duplicating?
 - Why is this meeting so important to Ms. Smith?
 - What will Ms. Smith say or do if the report cannot be duplicated in time.
 - Can we shorten the report or substitute for the report?
-

Instruction_3

Gathering_Information

After Judy had taken a moment to write down some questions to ask in order to gather the information she needed to make a decision, her boss, Ms. Smith, returned to the office. Ms. Smith noticed the report was still on Judy's desk, and she asked "Why haven't you taken the report to Reprographics? I need it tomorrow." Judy replied, "I did, but Joe refuses to do it because he has a stack of work orders that are ahead of us. He says he cannot stop doing those work orders to do your report."

Ms. Smith became angry and headed to Reprographics to Joe and to demand that Joe stop the other duplicating jobs and do the report. Judy asked her not to go. She said, "Ms. Smith, please let me talk to Joe. But before I do, I need some information from you."

Judy learned from her questions that the clients had boarded a plane this morning in Hawaii and would arrive in Dallas at noon tomorrow after a stop over in Los Angeles to get a bid from another advertising company. They could not be contacted because of the stop over. Also, they must have the report in order to make a decision on the plan in order to compare it with the other advertising company's plan in Los Angeles. They must make a decision by the end of the week. Also, it would project a bad image for the company if we did not have the report ready for them to read and to analyze.

..

Ms. Smith also told Judy that this contract would be a million dollar contract for the company. The information is totally confidential, and no one may know about the pending contract.

Ms. Smith also told Judy that the report must be done on the company letterhead and bound a certain way in order to meet the specifications set up by the clients, which eliminates her thought to go to Zippy Print and doing the job herself.

Joe has always been very nice to Judy, but he openly does not like Ms. Smith. In fact, last week Joe had to stop production to do some duplicating for Ms. Smith. He was then reprimanded by another department because their work was not ready. After this incident, Joe told Judy to get her boss more organized.

Ms. Smith was called out of the office for the remainder of the day. Upon leaving, she told Judy to handle the duplicating job the best way possible, but to get the report ready for the meeting tomorrow.

Now that Judy has found out more information about the clients and the report, she needs to identity the components of the problem. The components are the things or situations that can be changed. Therefore, we need to ask "what can be changed?"

List the components on the "Solve the Problem" outline.

Feedback_3

Component_Analysis

Joe is the only component in the problem. Joe is the only one who can change. Judy cannot be a component because Judy cannot print the report because of the printing specifications set up by the clients. Ms. Smith cannot change her meeting because her clients are already on their way to Dallas and cannot be stopped.

Instruction_4

Possible_Solutions

Since the report has been left totally to Judy, she must devise a solution to the problem.

Judy must now brainstorm and think freely to generate possible solutions to her problem. Remember, you are looking for ways to change the component.

On you "Solve a Problem" outline, list the possible solutions to the problem.

Feedback_4

Possible_Solutions

Judy can:

1. Ask Joe to stop everything and do Ms. Smith's report.
 2. Ask to do the job after 5 using the Reprographics Department's equipment.
 3. Talk to the other departments, on Joe's behalf, who have work orders in the Reprographics Department that are labelled "rush" to see if they are really needed now.
 4. Make arrangements with Joe to work the afternoon for him while he is getting the report duplicated.
-

Instruction_5

Constraints_& Assumptions

Jane realizes that either of her choices for a solution is hinged on Joe and his unwillingness to cooperate. Jane now must look at the constraints of each solution and make assumptions about the situation.

On your "Solve a Problem" outline, lists the constraints and assumptions for each solution.

Feedback_5

Constraints & Assumptions

Judy realized that both of her solutions hinged on her ability to persuade Joe to do the duplication without compromising confidentiality. Possible constraints and assumptions would be:

Joe_do_the_whole_job

Constraints:

Joe's total objections to doing a rush job for Ms. Smith

Joe has other deadline work to do.

Joe's resentment to Ms. Smith

Joe could refuse to discuss it altogether.

How much information will Judy need to tell Joe in order to get him to do the job? Will Judy need to break confidentiality and tell Joe what is at stake in this meeting?

Assumptions:

Assume that Joe can stop the other work to do Ms. Smith's report.

Assume that Joe is trustworthy and can keep quiet about the dollar amount of the job.

Judy_do_the_work_after_hours:

Constraints:

Joe's willingness to let her do it.

Judy's knowledge of the equipment.

Overtime and company policy

Assumptions:

Assume the company will allow her to work in the department after hours.

Talk_to_the_other_department:

Constraints:

Joe's willingness to let Judy do this.

Cooperation of the other departments.

Joe will do the printing but Judy will help.

Same constraints as above.

Assumptions:

Assume company policies will allow Judy to do part of the work.
Assume the offer to help eliminate the need to break confidentiality.

The main constraint in the situation is Judy's decision to not tell Joe about the million dollar contract unless he refuses to do the job.

Instruction 6

Choose

After considering the constraints, Judy must now choose one of the possible solutions. To determine the best solution, Judy must consider her goal (to get the report ready for tomorrow's meeting), the positive and negative consequences of each option, and the constraints.

Choose one of the solutions and record it on your "Solve a Problem" outline.

Feedback_6

Choose

Judy chooses to go to Joe and to explain further how important it is that the report is ready for tomorrow's meeting giving him all the facts about not being able to reach the clients and offering to do all the collating or working in his department for the afternoon helping in any way if he will print and bind it. In taking this route, Judy chooses to not break confidentiality.

Instruction_7

Analysis

Now that Judy has decided how to handle the situation, she must analyze the situation by identifying all the factors that must be considered. Here again the words who, what, when, where, how, and why should be useful.

Answer the questions on your "Solve a Problem" outline.

Feedback_7

Analysis

These are possible questions for Judy to consider:

1. Who will talk to Joe?
 2. What will be said to Joe to change his mind?
 3. How much information will Judy tell Joe?
 4. When will Joe be contacted?
 5. Where will Joe be contacted?
 6. What suggestions will be made to Joe about Judy helping to do the work done?
 7. How much work will Judy offer to do?
 8. Why would Joe refuse to do the job regardless of the offer and information?
 9. What will Judy do if Joe refuses?
-

Instruction_8

Synthesis

In the first synthesis step the analysis questions are answered. In the second step the detailed plan is organized and developed.

You will need to do this step now on the outline.

Feedback_8

Synthesis

The answers to these questions will provide the basis for the detailed plan for handling the situation. The answers for Synthesis Step 1 could be:

1. Judy
2. Judy will do anything she can to help.
3. Tell Joe that the clients cannot be reached and it is a very important deal but do not tell about \$ amount of the deal.
4. Go to him immediately.
5. Talk with him in his office.
6. I will do the collating if you will print and bind the report.
7. Collating.
8. Joe's dislike for Ms. Smith.
9. Only if Joe flatly refuses will Judy tell how much money is involved.

Step 2 of the synthesis plans the step-by-step procedure for impliment the plan.

Go to Joe immediately

Ask to speak to him in his office

Tell Joe about not being able to reach the clients because they are on an airplane at this minute enroute to Dallas.

Emphasize the importance of this meeting to the company, and emphasize the business it will bring to the company.

Offer to help by doing all of the collating or anything in the department to help.

If Joe flatly refuses, tell him that the meeting could mean a million dollar client added to the company.

Instruction_9

Evaluation - Internal & External

Evaluation involves two steps. The first one is an internal one in which the decision-makers decide if the solution will work to solve the problem. The second is the external evaluation which is the specification of how you will determine if the plan has worked.

Feedback_2

Evaluation -- Internal & External

The external and internal evaluations will be done by Judy because she is the decision maker and the one responsible for the report being ready.

UNIT 12
TRAINING

INSTRUCTOR'S GUIDE

Unit 12

Unit Title: TRAINING

Contents of Unit: Training

1. Compose an instruction sheet at the computer giving step-by-step instructions of the training task
2. Practice demonstrating the training task
3. Demonstrate the training task to the trainee
4. Assign a task for the trainee to do that will demonstrate the trainee's ability to do the task
5. Evaluations of trainer, trainee, and instructor

(This unit should be done at a time when all of the students can work together to add a change of pace to the course.)

Unit Objective: Upon completion of this unit, the student will be able to:

1. Train a fellow classmate by creating an instruction sheet, by demonstrating the task, equipment, or software, and by assigning a short job for the trainee to do to demonstrate mastery of the task.
2. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
3. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.

Equipment and Materials Required:

Handouts for Unit 12
Software as needed
Hardware as needed
Evaluation forms

Procedures:

Discussion
Demonstration

Learning Activities:

Students are to follow instructions given in Student's Laboratory Guide to complete Jobs 1-3 in Unit 12.

Evaluation:

In this training unit, the students will do the following three things:

1. compose at the computer a handout describing the task to be demonstrated
2. plan and give the demonstration
3. evaluate their trainee's understanding of the task by giving the trainee a short job to complete showing their knowledge of the demonstrated task.

Evaluations will be done by the trainer, the trainee, and the instructor. The student-trainer should be graded on completeness of the handout, the completeness of the demonstration, the organization of the demonstration, and the delivery of the demonstration. The evaluation on the following page may be used by the instructor.

The trainee has been asked to ask questions of the trainer in order to make the trainer think on his/her feet. Therefore, a participation grade should be assigned to the trainee. Since each student will be a trainee as well as a trainer, this participation grade would average in as 10% of the grade on this unit. This participation grade is very important in order to insure quality participation for the sake of each trainer.

Grading for this job can be broken into the four following grades:

Handout grade	30%
Demonstration Grade	50%
Reenforcement Job Grade	10%
Participation Grade (as trainee)	10%

SAMPLE HANDOUT

DEMONSTRATION OF HOW TO OPEN A DOCUMENT USING DW4

DisplayWrite 4 is a word processing software used on IBM computers or IBM-compatible computers. This software allows the user to create and revise documents, move text, merge documents, create library documents, create column, and do some math functions.

When creating a document, you must tell the software how wide the margins should be, what line the printer should start printing, whether to single space or double space, how long the paper will be, whether the paper is sheet fed or continuous fed, and what print size to use. On DisplayWrite 4, there are several defaults (values that are set up by the software when the computer is booted up). The following items are set as defaults:

1. margins - 1 1/2 inch left and 1 inch right
2. line spacing - single spaced
3. top line - line 7
4. type style - pica
5. paper size - 8 1/2 x 11
6. last line of typing - 60
7. paper source - top

If you want to change any of the above defaults, you simply go to the menu and change the default to the value you need.

The following are step-by-step instruction for creating a new document:

1. Boot up DisplayWrite 4 by putting in Volume 1.
2. Enter the date and press "ENTER."
3. Enter the time and press "ENTER."
4. At the D> type "DW2" and press "ENTER."
5. At the prompt for printer, press "ENTER."
6. The IBM emblem will show on your screen, press any key to continue.
7. The menu with "Create Document" should appear on your screen. Take out the Volume 1 disk and put in the Volume 2 disk.
8. Choose "A" and "ENTER.".

9. A four-entry menu will appear next, press "b" and "ENTER."
10. Another menu will appear. Press "B" and "ENTER."
11. The margin status line will appear, you will need to change the left margin to a 1-inch margin. Your cursor is on the left margin. Using the backspace key, backspace five times to move the margin.
12. Press "ENTER" twice to get to the typing area.
13. Now you are ready to type the document which calls for single spacing and 1-inch side margins.

The handout for the student begins on the next page

TRAINING

In every job, there is a certain amount of training that must take place. Sometime in your career, you will be asked to train a fellow worker. Therefore, this unit will involve your training a fellow classmate. The student should be able to accomplish the following objectives:

1. Create a handout for your trainee which gives step-by-step instructions of how to do a task in the office.
2. Practice the demonstration so that you know how to complete the task.
3. Demonstrate the task for your trainee and answer any questions that may arise.
4. Evaluate yourself according to completeness of your handout and ability to demonstrate the task as well as answer questions.
5. Be evaluated by your trainee in order to receive feedback on good points and on needed improvements.

Instructions for the Assignment

You will spend one class period reviewing your task for demonstration. The next class period will be spent creating a handout giving step-by-step instructions for completing the task. The following instructions should be followed in composing the handout.

1. The handout is to be composed at the computer with NO written notes.
2. You will need to give a general description of the training experience. You will need to assume your trainee knows nothing about the task; therefore, you will need to give a good description of equipment, software, task to be performed, etc. Be creative and very thorough.
3. Use enumerated items when giving step-by-step instructions.
4. Use complete sentences at all times.
5. The handout should be at least one page.
6. Make sure the instructions are complete and in the correct order by practicing the task using your instructions.

Plan Your Demonstration

1. Plan how you will demonstrate this training experience to your trainee.
2. Plan the order in which you will demonstrate the task.

Plan a Reinforcement Job

1. Create a short job for your trainee to do in order to reinforce what the trainee has learned.
2. Determine how you will evaluate the job.
3. Plan for additional instruction if the trainee does not complete the short reinforcement job.

Evaluation

1. You will evaluate your handout, your demonstration, and your reinforcement job.
2. You will be evaluated by your trainee regarding your handout, your demonstration, and your reinforcement job.

Trainee's Job

When it is your turn to be the trainee, you will want to be attentive so that your trainer will have an opportunity to his/her best. You must ask your trainer at least three questions. These questions should be asked so that the trainer will have to give more explanations about the task. Avoid questions that allow only "yes" or "no" answers.

Areas for Demonstration

Areas for consideration for a task to demonstrate are as follows:

1. creating fields for dBase3
2. opening files for dBase3
3. printing on dBase3
4. sorting on dBase 3
5. creating columns for Lotus 1-2-3
6. entering data in Lotus 1-2-3
7. creating equations in Lotus 1-2-3 and replication
8. opening a document in DisplayWrite 4
9. merging documents in DisplayWrite 4
10. creating a document using column layout in DisplayWrite 4
11. paginating and printing documents in DisplayWrite 4
12. creating a document using stored paragraphs in Displaywrite 4

13. inserting the paper in a pin wheel printer and changing the ribbon
14. answering the telephone and transferring calls.
15. introducing the student to the current filing system in the office

Trainee Name _____

TRAINEE-EVALUATION OF DEMONSTRATION

Rate your trainer in each question according to the following scale:

Excellent = 5 Good = 4 Fair = 3 Poor = 2 Very poor = 1

Does not Apply = 0

Some questions require yes or no answers. If the answer to the question is yes, rate your trainer according to the above scale. If the answer is no, write no in the blank.

1. Did the handout give complete, step-by-step instructions? _____
2. Was the handout well organized? _____
3. Did your trainer use complete sentences? _____
4. Was the demonstration well planned? _____
5. Did the demonstration show you all needed to know about the task? _____
6. Did you ask questions during the demonstration? _____
7. Was your trainer about to answer the questions you asked? _____
8. Rate your trainee's demonstration. _____
9. Did your reenforcement job practice what was demonstrated to you? _____
10. Did the you complete the task as well as you expected to complete it? _____
11. Did you need additional instruction for your task? _____
12. Rate your trainer's overall performance. _____

Comments:

What area of this demonstration did you like the best? _____

What area of this demonstration did you like the least? _____

Other comments _____

Name _____ Name of Trainee _____

INSTRUCTOR-EVALUATION OF DEMONSTRATION

Rate your student in each question according to the following scale: Excellent = 5 Good = 4 Fair = 3 Poor = 2
Very poor = 1 Does not Apply = 0

Some questions require yes or no answers. If the answer to the question is yes, rate your trainer according to the above scale. If the answer is no, write no in the blank.

1. Did the handout give complete, step-by-step instructions? _____
2. Was the handout well organized? _____
3. Did the trainer use complete sentences? _____
4. Was the demonstration well planned? _____
5. Did the demonstration show the trainee all needed to know about the task? _____
6. Did the trainee ask questions during the demonstration? _____
7. Was the trainer able to answer the questions you asked? _____
8. Rate the trainer's demonstration. _____
9. Did the trainer's reinforcement job practice what was demonstrated? _____
10. Did the trainee complete the task in the same manner as demonstrated? _____
11. Did the trainee need additional instruction for the task? _____
12. Rate the trainer's overall performance. _____

Comments:

What area of this demonstration did you like the best? _____

What area of this demonstration did you like the least? _____

Other comments _____

Name _____

SELF-EVALUATION

Rate yourself in each question according to the following scale:

Excellent = 5 Good = 4 Fair = 3 Poor = 2 Very poor = 1

Does not Apply = 0

Some questions require yes or no answers. If the answer to the question is yes, rate yourself according to the above scale. If the answer is no, write no in the blank.

1. Did your handout give complete, step-by-step instructions? _____
2. Was your handout well organized? _____
3. Did you use complete sentences? _____
4. Was your demonstration well planned? _____
5. Did your demonstration show your trainee all he/she needed to know about the task? _____
6. Were you able to questions answer the questions asked by your trainee? _____
7. Did your reenforcement job have the student practice what you demonstrated? _____
8. Did the student complete the task as well as you expected her/him to complete it? _____
9. Did you plan additional instruction for your trainee? _____
10. Rate you overall performance. _____

Comments:

What area of this assignment did you like the best? _____

What are of this assignment did you like the least? _____

Other comments _____